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A Qualitative Study Examining the Learning Orientations of Adult Doctoral Students in a
College of Education Using Houle's Typology as a Framework

by

Kristeen Hendricks Bulluck

A dissertation submitted in partial fulfillment
of the requirements for the degree of
Doctor of Philosophy
Department of Leadership, Counseling, Adult, Career, and Higher Education
College of Education
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DEDICATION

As I enter the final stage of my program and begin my dissertation, I recall the tireless hard work I have put into making my dreams come true. I took classes while working full-time as an elementary teacher, requiring a two-hour drive to attend night classes twice a week. I gave up my social life to complete my course work. During this time, I even got married and had a baby. There were times I was not sure if I could keep going. I was fortunate enough to have my belief in God, family, professors and peers to encourage me through obstacles and successes.

I dedicate this doctorate to my Mom, Dad, my husband Dave, and daughter Tiffanee. First, I would like to thank my Mom and Dad, Kati and Randy Hendricks, who were my very first teachers. They always taught me to try my best, never give up, and pursue my dreams. For the past seven years of pursuing my doctorate, my parents have encouraged me every step of the way. I really appreciate their love, support, and prayers.

Second, I would like to thank my husband Dave for joining me on this journey and helping me to finish. Thank you to my daughter Tiffanee for tagging along to interviews and meetings. You motivated me to finish so you can be proud of Mommy!

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ABSTRACT

Houle conducted one of the first studies about adult learner participation. In 1961, Houle wrote *The Inquiring Mind*, which describes three distinct learning types: goal-oriented, activity-oriented, and learning-oriented learning. For more than fifty years, *The Inquiring Mind* has been read, referenced, and reviewed. Several scholars during the 1970s, 1980s, 1990s, and 2000s have added dimensions to Houle's typology including: Sheffield (1964); Burgess (1971); Boshier (1971); Houle (1983); Gordon (1993); and Brockett and Donaghy (2011). What is missing in the current research is that no one has synthesized all of the literature and directly asked learners of today if the typology is still relevant, or if additional dimensions are needed for relevancy.

Houle's typology has been widely applied to various adult learners and not just non-credit adult learners. This study was conducted to explore if Houle's typology could be applied to credit seeking adult learners in contemporary doctoral programs.

The participants were doctoral students in the College of Education at a large urban research university. Results of this study concluded that participants were representative of Houle's three learner types (goal-oriented learner, activity-oriented learner, and learner-oriented learner). However, these doctoral students did not seem to require as many social interactions as Houle's non-degree students.

Additional findings indicated that participants were role models, had a desire to contribute to society, gained self-confidence, sought self-fulfillment, and used acting as a role model to their children as a motivator.

Seven themes found through this research were goal-oriented learning, activity-oriented learning, learner-oriented learning, role modeling, contributing to society, self-confidence, and self-fulfillment. All the themes seemed to be very prevalent among participants except for activity-oriented learning.

One implication of this research is the importance of incorporating motivations into program planning to help adult participation in both credit and non-credit programs. Further research might be conducted with multiple universities and with participants seeking advanced degrees in varied disciplines.

CHAPTER ONE

INTRODUCTION

According to Houle (1972),

Adult education is the process by which men and women (alone, in groups, or in institutional settings) seek to improve themselves or their society by increasing their skill, knowledge, or sensitiveness; or it is any process by which individuals, groups, or institutions try to help men and women improve in these ways. (p. 32)

There are various reasons for adult students to be motivated and support their continued learning through formal education. Many adult students seek to further their academic education to advance their careers (Cross, 1981), earn better pay at their jobs (Stein, Trinko, & Wanstreet, 2008), gain needed skills (Rogers, 1951), or simply learn something of interest (Lindeman, 1926).

Statement of the Problem

Houle conducted one of the first studies about adult learner participation. In 1961, Houle wrote *The Inquiring Mind*, a book based on lectures that described a study he conducted on what motivates adults to learn. He came up with three distinct learning types: goal-oriented, activity-oriented, and learning-oriented. Goal-oriented students have clear and defined goals to accomplish while activity-oriented students are drawn to the social aspects of learning. Learning-oriented students engage in learning as a habitual activity.

For more than fifty years, *The Inquiring Mind* has been read, referenced, and reviewed. Several scholars during the 1970s, 1980s, 1990s, and 2000s have added dimensions to Houle's typology including: Sheffield (1964); Burgess (1971); Boshier (1971); Houle (1983); Gordon (1993); and Brockett and Donaghy (2011). What is missing in the current research is that there has been no research that has synthesized all of the literature and directly asked learners of today if the typology is still relevant, or if additional dimensions are needed for relevancy.

Houle's (1961) research was conducted on adult learners who were involved in non-credit seeking continuing education programs. His typology is a reflection of his research working with non-credit seeking continuing education students. However, Houle's typology has been widely applied to various adult learners and not just non-credit adult learners. Therefore, this study explored whether Houle's typology could be applied to credit seeking adult learners in today's environment. More specifically, this study focused on degree seeking doctoral students. According to 2014 US Census Bureau data, only 1.77% of the United States population obtained a doctoral degree in 2014. What factors motivate such a small population of students to continue to pursue high levels of academic learning given that doing so is clearly outside the norm of education attainment in the general U.S. population. The general guiding question for this study became: Does Houle's typology hold true for contemporary degree seeking students in a doctoral program?

Purpose of the Study

The purpose of this study was to explore why doctoral students continue to participate in formal education. In 2013, the National Center for Education Statistics

(NCES) reported that 34% of the population ages 25 to 29 years earned a bachelor's degree or higher. In 2012, NCES reported that 2.9 million were enrolled in higher education. This was a 57% increase since 1990 and is projected to go up to 3.6 million by the year 2023. Furthermore, in 2014 the NCES reported that 73% of all college students were identified as non-traditional learners. Knowing what contributes to graduate students continuing their education is important for college recruitment and can also help professors adapt their teaching to meet their students' needs. Wlodkowski (2008) stated that "rather than trying to figure out what to 'do to' learners, we should 'work with' them to elicit their intrinsic motivation" (p. 21). Wlodkowski believed that in order to be an effective teacher, one must review their teaching methods and figure out how to motivate students to keep learning (2008).

Knowles (1980) wrote *The Modern Practice of Adult Education*, which discussed how knowing an adult student's motivation is important, as well as knowing what an adult student hopes to acquire from their education. Therefore, knowing adult students' motivation may help in developing programs that align with their interests, allowing teachers to tailor their instruction to keep students motivated.

More specifically, a study by Spaulding and Rockinson-Szapkiw (2012) looked at factors doctoral students perceived attributed to their success in completing their degrees. These factors were: personal and professional motivations for pursuing the degree; academic match (program compatibility with personal and professional goals and expectations); social-personal match (personality and communication style of dissertation committee chair and members); personal support systems; realistic goals and implementing strategies to meet them; and seeking opportunities for economic integration

(e.g., scholarships, fellowships, and assistantships). These factors suggest some relationship to Houle's three learner types, and this study may provide additional insight into doctoral students' experiences and help us better understand their motivation. This may also help us think about ways in which doctoral programs might better support student motivation and persistence to increase degree completion.

Research Questions

The research questions for this study were adapted from Houle's work, which guided his study as published in *The Inquiring Mind* (1961):

1. What are the individual learning characteristics and perspectives expressed by adult doctoral students over the age of 40 in Education doctoral programs (representing three educational programs) regarding their learning?
 1. A. What events or experiences led these doctoral students to continue their formal education?
 2. How do these doctoral students' motivations to continue to learn in the formal setting compare to Houle's non-degree seeking students' motivations to continue learning in the non-formal setting?
2. B. Are there any new learner-types that emerge to add to or update Houle's typology?

Delimitations and Limitations

The population of this study was specifically delimited to doctoral students age 40 or older in a College of Education at a large urban research university in the southeastern U. S. A further delimitation was that participants were selected from one department, which provides advanced graduate study at the master's, educational specialist, and

doctoral levels in five program areas: Adult Education, Career and Workforce Education, Counselor Education, Educational Leadership and Policy Studies, and Higher Education

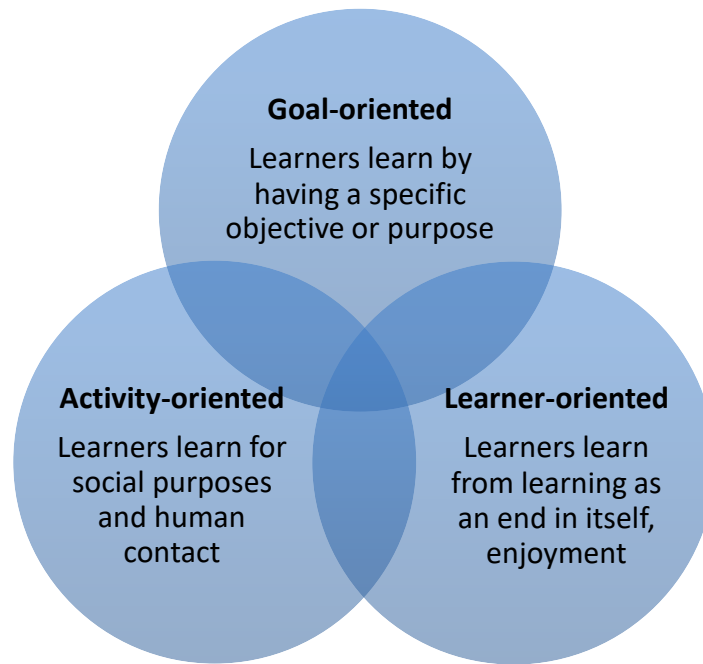


Figure 1. A visual representations of Houle’s three learner-types and their relationship to one another.

and Student Affairs. Four of the six participants in the study were Adult Education doctoral students. The other two participants came from the Career and Workforce Education and the Higher Education programs. As a doctoral candidate in the same department, the researcher had easy access to these adult learners and had built rapport with many students who had taken coursework in Adult Education.

One limitation of this study is the small number of participants, which is not uncommon in qualitative research as the intent was not to generalize, but to understand a group of students’ views. Another limitation is that this research only looked at doctoral students in a College of Education in a large urban research university. Students in

different fields, in graduate degree programs other than doctoral programs, or in other types of universities may have different views and perspectives from the sample used in this study.

Definition of Terms

1. **Adults** can be categorized in three groups: younger adults (18 to 24 years old), working-age adults (25 to 64 years old), and older adults (65 and older) (Wlodkowski, 2008).
2. **Motivation to learn** is the attention and effort to find learning activities meaningful and worthwhile and to benefit from those learning activities (Brophy, 2004).
3. **Goal-oriented learning** is the process by which learners learn for a specific objective or purpose (Houle, 1961).
4. **Activity-oriented learning** is the process by which learners learn for social purposes and human contact (Houle, 1961).
5. **Learning-oriented learning** is the process by which learners learn for learning as an end in itself, enjoyment (Houle, 1961).
6. **Participation** is being involved or committed with a common goal shared with others. The activity is accompanied by orientations, beliefs, feelings, and ideas (Courtney, 1992).
7. **Learning** is an individual's process of growth by developing competencies to fulfill their potential (Knowles, 1990).

Organization of the Study

Chapter 1 introduces the problem to be studied. It also focuses on the statement of the problem, purpose of the study, research questions, delimitations and limitations, and definition of terms.

Chapter 2 focuses on a review of literature on adult motivation. The review discusses participant models for adult learners, psychology of motivation, adult motivation research, instruments to measure adult motivation, and the scholarly significance of the study being conducted.

Chapter 3 describes the methods used to explore doctoral students' motivation for continuing to participate in formal education. To understand participants' motivation, questions designed by Keintz (2004) were used for the interview process, and the interview protocol is described. In addition, Chapter 3 includes description of the research design, participants, institutional setting, reflexivity, data collection, and data analysis.

Chapter 4 presents the findings of the study. Additional information is provided about the participants, and findings are described by research question and major themes.

Chapter 5 presents a discussion of the results, draws possible conclusions, describes implications for practice, and makes recommendations for further study.

CHAPTER TWO

REVIEW OF LITERATURE

Adult motivation has been a topic of interest for many years. There has been significant research done on motivation and the reasons adults continue to learn. The term “motivation” may potentially cause confusion as it can have different meanings; however, the definition of “motivation” adopted for this study was described by Brophy as attention and effort to find learning activities meaningful and worthwhile and to benefit from those learning activities (2004).

Literature chosen to be included in this review were the works of highly respected authors who led the field in theory and research. Their books and articles were chosen because they added a background of collective work to this study. This chapter provides a foundation of historical and current research, looking at selected participation models for adult learners, briefly discussing the psychology of motivation, reviewing prominent adult motivation research, and finally, describing an instrument that measures motivation to pursuing continuing education.

Participation Models for Adult Learners

According to Courtney (1992), participation has four properties that are universal. First, participation is both an individual and group activity. Second, participation is associative as related to societal participation. Third, participation is qualitative because

an individual's attitudes, beliefs, and understandings of the organization affect the learner. Fourth, participants who are involved in organized learning typically have a goal they wish to accomplish. Participation in learning, then, connects to beliefs that assist with involvement as an individual or as a group member with a learning goal to accomplish.

Cross' (1981) book, *Adults as Learners*, describes two models of lifelong learning programs. The **Chain of Response Model (COR)** represents a framework for understanding adult learners who participate in educational activities and why they participate in these activities. COR starts with adults reflecting through (A) self-evaluation based on (B) attitudes about education to consider whether to participate in an educational activity. Additional determinants as to whether to continue education are (C) importance of goals and expectations that participation will meet goals. The goal may change with (D) life transitions (e.g., change job, divorce), and (E) opportunities and barriers (e.g., family), and information (e.g., course being offered cost, time offered). The determinants stated above assist with an adult's choice of participating in education.

The other Cross (1981) model is the **Characteristics for Adult Learners Model (CAL)** which represents a framework for thinking about what and how adults learn. The environment described in CAL consists of both personal and situational characteristics and can promote or prevent adults from continuing their learning. Personal characteristics are aging, life phases, and developmental stages. Aging can result in the deterioration of certain sensory motor abilities (e.g., eyesight, hearing, reaction time) while intellectual abilities (e.g., decision-making skills, reasoning, and vocabulary) are likely to improve. Life phases and developmental stages (e.g., marriage, job changes,

and retirement) involve a series of plateaus and transitions that may not be directly related to age. Situational characteristics are part-time versus full-time learning and required versus voluntary learning.

Stein, Trinko, and Wanstreet's article, "Seen in a New Light: Patterns of Adult Participation in Higher Education" (2008), describes a model for continuing learning as PRiSM, an acronym for P, possibilities for intellectual, personal, and career opportunities; R, reflective learner; i, institutional support; S, synchronizing learning and earning; and M, match with an academic reputation. The authors suggest that "enrollment in formal higher education is a decision made on the basis of existing social capital, networks of community, family, occupational support, and acquired educational capital... Social capital includes the knowledge and networking resources that reside in and are available for adults to use toward the common good" (p. 6). This article draws attention to the importance of the factors that contribute to the student's decision that leads him or her to participate in higher education.

The decision for adults to continue their learning can be connected to various extraneous variables, some of which can be time, money, family structure, and/or responsibilities (e.g., children, employment, marital status). The decision also can be connected to a bigger picture of making a difference in the world and choosing the correct path or place to achieve that goal.

Psychology of Motivation

Starting chronologically, Lindeman's (1926) book, *The Meaning of Adult Education*, recognizes some of the main motivations for adult learners. Adult learners are motivated to learn when: they experience their needs and interests; their orientation

to learning is life-centered; experience is the richest source for their learning; and they have the desire to be self-directed learners.

Applying adults' desire to be self-directed in their learning, Rogers (1951) wrote the book, *Client-Centered Therapy*. Rogers believed that people have a desire to be at their highest potential and become the best people they can (e.g., an actualizing tendency). He found that clients often look to their therapists for guidance or direction in their lives. This came to be known as "client-centered therapy" or personality development. He believed that the therapist should not direct the client, but instead the client should be the one who is in control. Therefore, when the client is in control and making his/her own decisions, he/she is self-directed. When a client achieves his/her potential, he/she is experiencing actualizing tendency.

Relating to Roger's idea of actualizing tendency, Maslow wrote *Motivation and Personality* in which put forward his theory of motivation based on needs and led to his conceptualization of his "hierarchy of needs" (1954). Maslow describes how a person's needs motivate their behaviors. The visual representation of the hierarchy of needs is a pyramid divided into different levels. The bottom level of the pyramid represents the most basic needs, and as a person progresses to the next level, their needs are harder to obtain. In order for a person to gain higher mental and moral development, they must satisfy the lower needs. Once basic requirements are met, a person seeks love and a sense of belonging, then a person will seek self-actualization. The first level is the physiological needs (e.g., air, food, and water); the next level is the safety needs (e.g., physical safety, job security); then the next level is the belonging needs (e.g., friendship, family, intimacy); the following level is the esteem needs (e.g., self-esteem, self-respect,

self-confidence); and finally, the top of the pyramid is self-actualization. Self-actualizing people use their talents, capabilities, and potentialities to the best of their abilities and to be connected to the world. These are the people who achieve their personal definition of success.

As adults are seeking self-actualization, environmental interactions are stressed. In Lewin's (1963) book, *Principles of Typological Psychology*, he developed a theory that stressed the importance of individual personalities, interpersonal conflict, and situational variables. Lewin presented the idea that behavior is the result of the interaction between the individual and the environment. He developed an equation $B = f(P, E)$, where B= Behavior, P= Person, and E= Environment. Thus, he surmised that motivated adults acquire knowledge best when they are using what they learn to connect to their lives. Adult learners desire to be self-directed in their learning. They strive to reach their actualizing tendency where they are using their abilities to peak performance in their learning, and their motivation for their learning is related to their environment.

Adult Motivation Research

Adult motivation research began in the summer of 1960 when Houle, a professor at the University of Chicago, was selected as a visiting professor to teach at the University of Wisconsin, Milwaukee Campus. Houle's position was established in memory of Mr. Kember K. Knapp, and the assignment was to deliver a series of public lectures. The audience that came to hear these lectures were from many disciplines. Houle's topic of choice was adult motivations to learn, which he believed would be an interesting topic to initiate discussion rather than conclude it. Houle (1961) wrote that he

felt that this was a concern to everyone because “what kinds of men and women retain alert and inquiring minds throughout the years of their maturity?” (1961, xii).

He included his research in his book, *The Inquiring Mind* (1961). He conducted research by interviewing 22 adults (10 females and 12 males). The participants’ ages ranged from 35 to 65 years with two under and two over the age range. The demographics continued with 12 married, one divorced, and nine single participants. The participants self-reported that one belonged to the upper class, five to the upper middle, 13 to the lower middle, and three to the lower class. They further self-reported that 18 were native-born, and four were foreign-born. Two participants had less than an eighth grade education; two had some high school; one was a high school graduate; five had some college; 10 were college graduates; and two had advanced studies, presumably for master’s or doctorate. The study did not specify which degree the students earned. The interviews were conducted in various offices and conference rooms and took anywhere from 45 minutes to three and a half hours. This study was an exploratory inquiry on what motivates adults to learn. Houle did not attempt to distinguish between learning in non-credit or credit-earning contexts.

Houle came up with three distinct learning groups: goal-oriented, activity-oriented, and learning-oriented learners. Goal-oriented students have clear and defined goals to accomplish. Activity-oriented students desire social opportunities in the educational setting to provide interactions with others that draw them to learning (e.g., friendship, romantic relationship). Learning-oriented students have a love for learning and view learning as a habitual activity (e.g., students who always carry a book with them). Some criticisms of this study are that Houle’s participants only included one non-

white person. In addition, the learners' struggles that they had to overcome in the course of their learning journey were omitted. However, this study is a very prominent one that has been referenced and reviewed many times.

There were many valuable research findings that Houle discovered from his interviews. Table 1 includes additional characteristics that Houle, along with his research group, developed to provide generalizations of each typology.

Table 1

Summarized Characteristics of Houle's Typology Classifications

Orientation	Characteristics
Goal-oriented learning	Begins with realization of a need or interest Not steadily or continuously involved in learning Not restricted to any activity, to one institution, or method of learning Need or interest appears to be satisfied by taking a course, joining a group, reading a book, or going on a trip
Activity-oriented learning	Participates socially to meet people and make friends Seeks to find a husband or wife, credit, escape problems, carry on traditions or meaningless activity Part of heritage May not say truth about motives to learn Finds success in coursework and not job
Learner-oriented learning	Joins groups or classes for educational reasons Has a constant goal rather than continuous Avid reader since childhood Selects serious programs on television Job selected for potential growth Trips planned out for what to see Desires to know Preoccupied with learning Learning is their way of having fun Self-concept that they are different from others

Since Houle, motivation to participate has remained a widely discussed topic by those interested in the education of adults. Two of Houle's students conducted studies

related to his typology. One student, Sheffield (1964) based on Houle's (1961) three types, developed *The Learning Activities Survey* to understand the extent of factors influencing a student's continued learning. *The Learning Activities Survey* consisted of a 58-item Likert-type questionnaire, using five response options: very frequently important for me, frequently important for me, sometimes important for me, seldom important for me, and never important for me. In addition to the 58 items, participants were asked to fill out demographic information and an activities participation survey.

The *Learning Activity Survey* was administered to 453 adult conference participants, who were both degree seeking and non-degree seeking from 20 conferences, held at eight universities in the United States. The 453 adult conference participants were 165 occupational conference attendees, 97 recreational conference attendees, 96 liberal conference attendees, and 95 functional conference attendees. The study did not include the students' age or education level. Sheffield found five factors: learning orientation, sociability orientation, personal-goal orientation, societal-goal orientation, and need-fulfillment orientation. However, a careful study of the results of the factor analysis found that Houle's three orientations were evident -- learning (learning orientation), activity (sociability orientation), and goal (personal-goal orientation). It was also found that within the test of activity orientation there were finer distinctions.

Another student, Burgess (1971) developed a questionnaire titled *Reasons for Educational Participation*. The instrument was administered to 1,046 adult students, degree seeking and non-degree seeking and involved in 54 different courses, classes, or learning activities. The study did not include the participants' age or education level. The survey consisted of a 70-item Likert-type questionnaire with the five-point scale of

how influential the items were on their participation. Burgess found seven orientations: the desire to know, the desire to reach personal goals, the desire to reach social goals, the desire to reach religious goals, the desire to take part in social activity, the desire to escape, and the desire to comply with formal requirements.

In order to expand upon his own typology for motivations to continue to learn, Houle (1983) wrote *Motivation for Adult Education* and presented at a conference organized by the German Commission. Houle believed that the three orientations (goal, activity, and social) were related to focused participants. Houle described subcategories of focused participants' learning as the desire to know, having religious goals, a need to escape, a required activity, and/or a social pressure. The desire to know was related to continued maintenance and growth, but a religious goal could be learning motivated by seeking personal salvation with their God. On the other hand, the escape may be that learning provides an outlet from a stressful situation; whereas, a required activity is learning in which a person will not gain advancement without additional formal education. Last, social pressure in learning can come from family, friends, and/or business that promotes formal education.

There was an additional need to update Houle's typology, so Gordon wrote *Houle's Typology: Time for Reconsideration* (1993). Gordon took a look back at Houle's 1961 typology of adult learners being classified as primarily goal-oriented, activity-oriented, or learning-oriented learners and with Boshier and Collins (1983) determined that the goal and learning orientations described by Houle were reasonably clear, but that activity-oriented learners were actually much more complex.

The activity-oriented learner can be prompted by a forced aggregate such as a social stimulation, social contract, external expectation, or community service items. Gordon's social stimulation, social contract, external expectation, or community service can be compared to Houle's (1983) paper presented in Germany where adults had the social pressure of family, friends, and/or coworkers to continue learning.

Expanding Houle's learner-oriented typology, Brockett and Donaghy (2011) wrote *Self-Directed Learning: The Houle Connection*. Brockett and Donaghy claimed that since Houle (1961) stated that learner-oriented individuals can be associated with having the "desire to know information," they are therefore responsible for their own learning as a self-directed learner. Thus, Houle was the first one to delineate self-directed learning as a characteristic of adults, which he passed on to his students Tough and Knowles. Although, Houle is the pioneer of this topic, Knowles further developed Houle's work, adding much research to the field. Knowles' (1975) book, *Self-Directed Learning*, made this topic very popular. Knowles theorized that most adults are self-directed, with or without the help of others, and that they will diagnose their learning needs and then set learning goals and objectives.

Table 2 illustrates the description of Houle's three learner types and expanded themes added by other authors in subsequent literature.

Instruments to Measure Adult Motivation

Boshier (1971) developed a quantitative instrument based upon Houle's typology, which became a topic of interest as a preferred method of classifying adult learners. The instrument is called the *Education Participation Scale (EPS)*. It consists of six factors: professional advancement items, community service items, external expectations items,

social contract items, social stimulation items, and cognitive interest items. The EPS is a 42-item Likert-type questionnaire with the following response choices: no influence,

Table 2

Houle's Three Learner-Types Classifications with Expanded Themes from Subsequent Literature

Typology Classification	Expanded Themes
Goal-oriented learning - learn by having a specific objective or purpose (Houle, 1961)	Personal goal orientation (Sheffield, 1964) Need-fulfillment orientation (Sheffield, 1964) Desire to reach a personal goal (Burgess, 1971) Professional advancement (Boshier, 1971)
Activity-oriented learning - learn for social purposes and human contact (Houle, 1961)	Desire to take part in a social activity (Burgess, 1971) Community service (Boshier, 1971) Sociability orientation (Sheffield, 1964) Societal-goal orientation (Sheffield, 1964) Desire to reach a social goal (Burgess, 1971) Desire to comply with formal requirements (Burgess, 1971) External expectation (Boshier, 1971)
	The desire to take part in a social activity (Burgess, 1971) Social contract (Boshier, 1971)
	Desire to escape (Burgess, 1971) Desire to reach religious goals (Burgess, 1971) Social stimulation (Boshier, 1971) Religious goal, escape, required activity, social pressure (Houle, 1983) Social stimulation, social contract, external expectation, community service (Gordon, 1993)
Learner-oriented learning - learn from learning as an end in itself, enjoyment (Houle, 1961)	Learning-orientation (Sheffield, 1964) Desire to know (Burgess, 1971) Cognitive interest (Boshier, 1971) Self-directed (Brockert & Donaghy, 2011)

little influence, moderate influence, and much influence. The lowest possible score is a six, and the highest score is a 24.

Boshier (1971) developed the EPS through personal communication with Houle and based the instrument on Houle's typology (1961). Boshier's factors were correlated to Houle's typology; however, after extensive research, Boshier found that Houle's three learner-types were limited, especially the activity-oriented learner. Houle's typology was portrayed with overlapping circles while Boshier's factors were independent and inter-correlated, and they did not present themselves as redundant scores.

Because this study is qualitative and Boshier's (1971) EPS instrument is quantitative, the EPS instrument was not used in this research; however, Boshier's questionnaire was important for understanding the instruments that had been used to ascertain students' motivations for continued learning.

Important details such as validity of the EPS were discussed in the Dia, Smith, Cohen-Callow, and Bliss (2005) article entitled, "The Education Participation Scale-Modified: Evaluation a Measure of Continuing Education." Boshier (1971) utilized the EPS and did a random selection of 223 participants who participated in courses in Adult Education at the Wellington High School Evening Institute, the Department of Extension at Victoria University, and the Workers' Educational Association in New Zealand. The responses were analyzed using the Principal Components Analysis (PCA) method which shows variations and patterns in a data set. The analysis revealed problems for five of the 14 components because they only contained one or two questions: six socially-oriented, two job-oriented, four learning-oriented, and two minor factors. To further analyze the instrument, Boshier conducted a second-order and a third-order factor analysis. Based on

that analysis, Boshier concluded that the motivation orientations are four independent and unrelated factors.

Further research by Boshier (1977) indicated that there could be six or seven factor solutions; therefore, small changes or differences would be seen in a larger sample size. Stevens (2002) recommended four or more components above .60 or three components above .80 to produce reliable factors to show strong correlation between component relationships of student characteristics and reasons to participate. Subsequently, Boshier used seven factors.

According to Boshier and Collins' (1985), Fujita-Starack (1996), and Kim and Merriam (2004), goal-oriented learning was the main motivation. Taking a closer look at each one of these studies, it can be seen that in the Boshier and Collins (1985) study entitled, "The Houle Typology After Twenty-two Years," the EPS was administered to 13,442 degree seeking and non-degree seeking learners from Africa, Asia, New Zealand, Canada, and the United States. The study did not include the participants' ages or degrees sought. Houle's goal-oriented learner and learner-oriented learner were clearly found; however, the activity-oriented learner was evident but as a required activity (e.g., social stimulation, social contact, external expectations or community service item). The required activities stated above were mentioned previously in Gordon's article in 1993.

Further research of the EPS was conducted by Fujita-Starack (1996) and referenced in "Motivations and Characteristics of Adult Students: Factor Stability and Construct Validity of Tie Educational Participation Scale." The study consisted of 1,142 students enrolled in non-credit continuing education programs from the University of Hawaii. The students' age range was 14-82 years old. The education of the participants

varied by 6.4% high school, 25.4% some college, 31.8% bachelor's, 11.3% some graduate school, 19% master's degrees, and 6.1% doctorate. Participants' degrees were not specified. The students were in three curricular groups: arts and leisure programs; personal development program; and professional development program. The findings in this study indicated that students' characteristics for participation in continuing education were connected to their curricular group; therefore, there was a distinctive set of student characteristics and reasons for a student's participation between certain curricular groups.

The study by Kim and Merriam (2004) entitled, "Motivation for Learning among Older Adults in a Learning in Retirement Institute," surveyed 189 members of Learning in the Retirement Institute using the EPS. The sample included men and women 50 to 80 years of age and older. The participants' education was: 2.6% attended 12 years of school or less; 1.1% attended a business or trade school; 10.1% attended some college but did not earn a degree; 7.9% earned a two-year college degree; 24.9% earned a four-year college degree; 34.4% attended a graduate or professional school; and 19.9% earned a doctorate degree. Cognitive interest appeared to be the strongest motivator for learning, and social contact was the second most influential motivator.

Scholarly Significance of Study

This research is expected to add to the field of adult and continuing learning by exploring the motivations behind adult students who continue to learn in a doctoral program. By examining only doctoral students, this study has the potential to clarify the extent to which Houle's typology is relevant to learners in the formal credit-earning sector of education. As has been noted, some research building upon Houle did not specify the educational setting. Motivations of continuing education and credit-earning

learners might have been merged, possibly leading to assumptions about shared, rather than distinct, characteristics.

Unlike Houle, who conducted his research with only one non-white person, this study included a diverse population. Also, Houle did not include any of the struggles and challenges students may have had to overcome during the course of their learning journey. Knowledge of students' challenges can help explain their motivation and desires to learn. Therefore, this study included a variety of races and ethnicities to support the typical classroom demographics of contemporary adult learners.

Summary

In conclusion, the literature selected was important to understand the motivations of adult learners, what influences their participation, and what can deter their participation. It was also imperative to provide a synopsis of Houle's study on adult motivation, as well as Sheffield's additions (learning orientation, sociability orientation, personal-goal orientation, societal-goal orientation, and need-fulfillment orientation); Burgess' additions (desire to know, desire to reach personal goals, desire to reach social goals, desire to reach religious goals, desire to take part in social activity, desire to escape, and desire to comply with formal requirements); Houle's additions (religious goal, escape, required activity, and social pressure); Gordon's additions (social stimulation, social contract, external expectation, and community service); and Brockett and Donaghy's addition (self-directed) to Houle's original findings. Finally, it was necessary to discuss Boshier's EPS instrument to measure Houle's learner-types even though it was not used in this study because it was quantitative.

It is important for adult educators to understand adult students' motivation(s) in order to assess and meet their needs. The main purpose of this literature review was to discuss the various reasons why adult students continue to learn. Many younger students return for more education to advance their careers and earn better pay at their jobs, while adults come back to gain needed skills or to learn something of interest. There are numerous reasons why adult students are motivated to support their continued learning.

CHAPTER THREE

METHODS

This chapter describes the methods used to explore the perspectives between adult learners' main motivation to continue learning and the reasons for choosing this certain motivation. The chapter begins with a description of a pilot study. The chapter then reiterates the study purpose and research questions, followed by: (1) the design of the study which includes domains, participant selection, and a brief description of the institutional setting; (2) data collection and procedures; (3) data analysis; (4) steps taken to establish trustworthiness and credibility; and (5) a brief summary of the chapter.

Pilot Study

In a pilot study the researcher interviewed adult education graduate students about their motivation to continue to value and participate in the learning process. The study consisted of six students -- four females and two males. The three females were: African American, age 62; Chinese, age 24; and Saudi Arabian, age 30. The three male students were: White American, age 55; White American, age 36; and Costa Rican, age 32. The demographics included three married, one divorced, and two single participants. Five of the six participants had parents who went to college; two had parents with master's degrees. Only one had parents whose mother finished 3rd grade and father 8th grade.

Keintz (2004) questionnaire was modified for the study. Keintz's (2004) dissertation entitled, *A Qualitative Analysis of Adult Learners*, was modeled after Houle's

book and was a study of attitudes, motivation, preferred resources, desired settings, and reflective thinking of adult learners in the educational setting. Keintz interviewed five individuals -- three males and two females. Male participants were: White American, ages 46; White American, age 51; and Hispanic American, age 38. Female participants were: White American, age 42; and Hispanic American, age 48. Two had associate degrees (medical assistant and administrative assistant), and three had bachelor's degrees (concessions supervisor, administrative associate, and engineer). All the participants were employed.

Through his interviews, Keintz found that active adult learners have three main characteristics: (1) They were raised in supportive environments; (2) they rose above barriers; and (3) they were reflective in their thinking. The researcher obtained permission from Keintz to use an adapted questionnaire and interview questions. Appendix A contains the approval letter from Keintz.

The pilot study found that students' motivation was still goal-oriented, activity-oriented, and learning-oriented, but there was a new typology that students described, called "self-fulfillment." Figure 2 contains a Venn diagram of Houle's Typology further developed in the pilot study.

Self-fulfillment can be described as an intrinsic motivation for personal improvement. As for being goal-oriented learners, all six students interviewed were pursuing degrees; two indicated they wanted job skills, and two wanted the incentive of better pay. The following is an example of what one student stated to support learning as a goal, "First, I'd like to get a degree. Hopefully, I would like to get a skill that will work into whatever job I get."

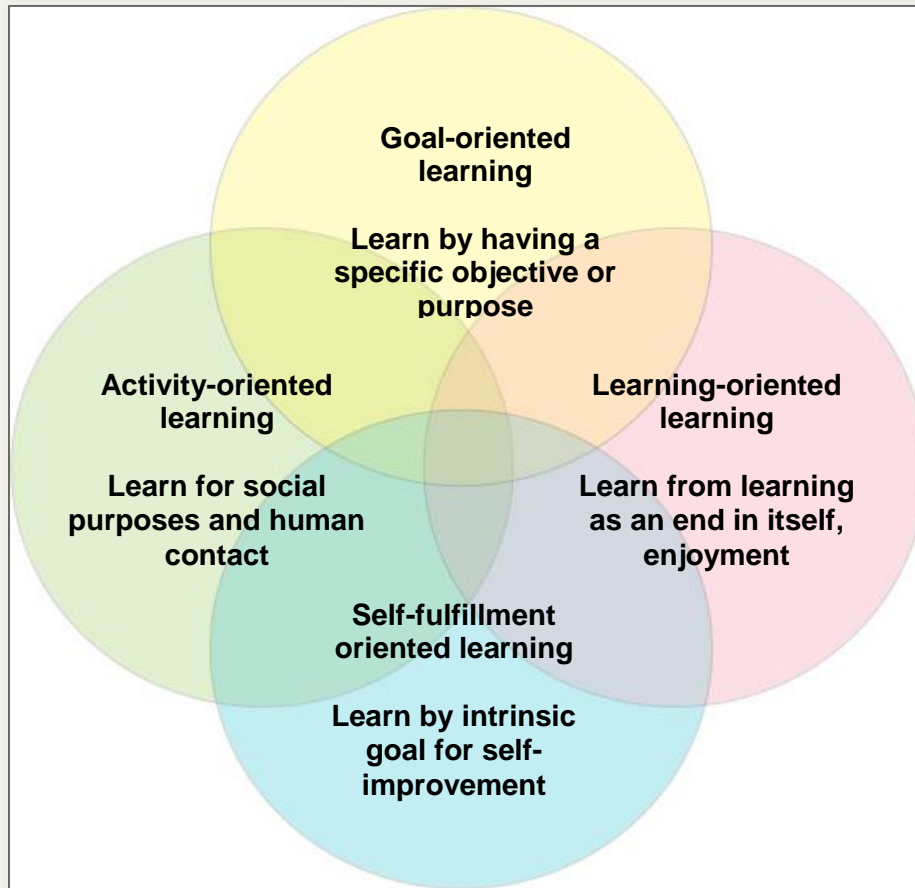


Figure 2. Venn diagram of Houle’s Typology further developed in the pilot study.

As for being activity-oriented learners, five indicated wanting learning to be a social activity using the words team learning, lecture with interaction, facilitated discussion, and interactive teaching method. Only one wanted to learn independently. The following is what a student stated about learning as an activity, “I think I learn best when interacting with the instructor and other classmates.”

As for learning-oriented learning, three discussed their love of learning. The following is an example of what one student stated to support love of learning, “While in

my history master's program, I didn't care whether I got the degree, I was just there to learn."

As for self-fulfillment oriented learning, there is a need for independence and self-improvement, and to prove oneself, which would be viewed as an intrinsic motivation. The following is a quote from a student to support self-fulfillment as independence, "I want to be independent. I also want to have a higher degree to support myself." The following quote is in support of self-fulfillment as self-improvement, "I think a lot of my learning is to turn it inward and how can this help me be a better person." The last example of self-fulfillment is from a student who wanted to prove himself by earning a degree. "One of my teachers said to the less desirable students that they never thought that any one of us would turn out to be anything good. The teacher was my drive and motivation," he said.

Over 50 years, the three motivations for continuing to learn developed by Houle (1961) have remained relevant. The new category "self-fulfillment" could be related to the highest level of Maslow's (1954) Hierarchy of Needs, which is self-actualization. It relates to the students' journeys with all the ups and downs and the improvements they make to themselves. Self-fulfillment is an internal process, and it requires the student to be self-reflective and self-directed in their learning. Self-actualization is when a person excels using their talents, capabilities, and potential to the best of their ability; self-fulfillment is a part of becoming self-actualized.

In order to further the research and to determine if students really do continue their learning for self-fulfillment, a questionnaire was administered. Students were asked to select among Houle's three learner-types (goal-oriented, activity-oriented, learner-

oriented), as well as the additional typology, self-fulfillment, identified in the pilot study. The participants were graduate students from the College of Education at the University of South Florida. There were 138 degree seeking students in total: 43 males and 95 females. The participants' degrees were not specified, nor were their ages. The data were collected during the 2014 spring semester in six courses with graduate students (master's and doctorate). The questionnaire contained only two questions: the gender of the participant and the main motivation for continuing their education. Figure 3 contains an example of the questionnaire.

Questionnaire
SELF-DIRECTED LEARNING AND THE INQUIRING MIND

The purpose of this questionnaire is to understand your motivation for continuing to learn. Please check the box with your best answer.

What is your gender?
 Male Female

What is your motivation for continuing to learn?
 Goal Oriented Learner (clear and defined goals to accomplish)
 Social Oriented Learner (social aspects that draw you to learning)
 Learning Oriented Learner (learning is a habitual activity)
 Self-fulfillment Oriented Learner (intrinsic feeling connected to learning)

Figure 3. Questionnaire about students' main motivation for continuing to learn.

Findings. The four research questions used in the pilot study and findings for each are summarized briefly below:

1. What is the main reason for adult students continuing to learn (goal-oriented,

learning-oriented, social-oriented, or self-fulfillment oriented)? The main motivation was goal-oriented learning with 47.1%, almost half of the total students selecting this response. Self-fulfillment was the second choice among participants at 34.8%.

2. What is the main reason for male adult students continuing to value learning? The main motivation for males was goal-oriented learning. Twenty-three of the 43 (53.5%) males chose goal-oriented learning, which is a little more than half. The second choice for males was self-fulfillment at 30%.

3. What is the main reason for female adult students to continue to value learning? The main reason for female students to continue their learning was goal-oriented learning. Forty-three of the 95 (45.3%) chose goal-oriented learning. Self-fulfillment was second with 37%.

4. Do male and female students differ in their main reasons for continuing to learn? The percentages differ with males at 53.5% and females at 45.3%.

The conclusions for the pilot study were that the main motivation, regardless of gender, was goal-oriented learning; the second selected motivation was self-fulfillment. Self-fulfillment was a 30% choice for males and a 37% choice for females. Additionally, males had a higher percentage of selecting goal-oriented learning. Lastly, both male and female students rated the motivations in the following order: goal, self-fulfillment, learning, and finally, activity.

Purpose of the Study

The purpose of this study was to explore why doctoral students continue to participate in formal education.

Research Questions

This study was guided by the following research questions:

1. What individual learning characteristics and perspectives are expressed by adult students over the age of 40 in Education doctoral programs regarding their learning?
1. A. What events or experiences led these doctoral students to continue their formal education?
2. How do these doctoral students' motivations to continue to learn in the formal setting compare to Houle's non-degree seeking students' motivations to continue learning in the non-formal setting?
2. B. Are there any new learner-types that emerge to add to or update Houle's typology?

Research Design

This qualitative study explored why adult students continue to participate in formal education. The rationale for taking a qualitative approach was to gain insight into the experiences and motivation behind contemporary adult doctoral students' motivation to continue their education.

The domains focused on in this study were based on Houle's (1961) typology (goal-oriented learning, learning-oriented learning, and activity-oriented learning). While all of the participants were at least 40 years old and in doctoral programs in one department in a College of Education, the researcher attempted to ensure that the participant pool was diverse by way of race/ethnicity and gender.

Participants

Participants were students from the College of Education at the University of South Florida. Originally, participants were intended to be at least 40 years old and in their first year in the Adult Education doctoral program in fall 2015. After sending out an email approved by the department chair to the six students who met the criteria, only two responded that they wanted to participate. Since I was not obtaining the needed number of participants, the criteria had to be changed. My committee decided to change the requirements for participation from first year doctoral students to doctoral students who were at least 40 years old and from any of the department doctoral programs. The Institutional Review Board (IRB) protocol was amended to match the updated criteria for participants. The dissertation chair identified nine potential participants. This time the email was sent out, and there were nine potential participants. After contacting each potential participant and talking with them about the study, six contacts agreed to participate.

The six participants were doctoral candidates in the College of Education, at least 40 years of age, and in the dissertation phase of their doctoral studies. The students balancing time for their doctoral studies with time for work and family. Accordingly, these students were likely more highly-motivated to continue their education than younger counterparts may be.

Four of the six participants were Adult Education doctoral students. One other participant was in the Career and Workforce Education program, and the other was in the Higher Education Administration program. As an Adult Education doctoral candidate, the researcher had easy access to these adult learners and had built rapport with most of

them through course work in Adult Education. No compensation was provided to participants.

While Houle had both male and female participants in his study, he did not stress racial/ethnic diversity. Efforts were made in this study to ensure gender and racial/ethnic diversity among participants. Table 3 provides an overview of the demographic characteristics of the six participants.

Table 3

Participants' Demographic Information

Participants	Gender	Age	Race	Employment	MA/Graduate Year	Ph.D./Start Year
Ann	F	41	White	Academic Advisor	Counselor Education/2001	Career and Workforce/2015
Barbara	F	47	African American	Strategic Initiatives	Public Administration/1996	Curriculum and Instruction with an emphasis on Higher Education/2015
Chris	M	44	White	Social Learning and Community Platform Strategist	Adult Education/1997	Curriculum and Instruction with and emphasis in Adult Education /2008
David	M	46	Hispanic/White	Learning and Development Training	Adult Education/2009	Curriculum and Instruction with and emphasis in Adult Education/2009
Ed	M	47	White	Academic Advisor	MEd in Student Affairs/2003	Curriculum and Instruction with and emphasis in Adult Education /2009
Felicia	F	42	Middle Eastern	Graduate Assistant	Applied Linguistics/2000	Curriculum and Instruction with and emphasis in Adult Education /2014

Institutional Setting

The study was conducted at the University of South Florida (USF) in Tampa, Florida. USF is a large urban research extensive institution. Participants in the study were enrolled in doctoral programs in Department of Leadership, Counseling, Adult, Career and Higher Education (LCACHE) which houses the doctoral programs in which the participants were enrolled: the Ph.D. in Curriculum and Instruction with concentration in Adult Education; the Ph.D. in Curriculum and Instruction with concentration in Career and Workforce Education; and the Ph.D. in Curriculum and Instruction with concentration in Higher Education Administration.

Data Collection Procedures

Prior to data collection, the researcher sought Institutional Board Review (IRB) approval for the study. After IRB approval was granted, participants were asked via email to sign a consent form. A copy of the email solicitation can be located in Appendix B, and the IRB-approved consent form can be viewed in Appendix C. These were provided a week in advance of data collection, and participants were able to drop out of the study at any time.

The first step was to have the participants complete the Adult Learner Questionnaire, which collects demographic and background information. The Adult Learner Questionnaire was adapted to include demographics (e.g., age, race/ethnicity), work history, formal education history, and non-formal activities. The Adult Learner Questionnaire can be viewed in Appendix D.

Second, the participants were interviewed using a semi-structured interview protocol which included initial and follow-up interviews, taking no more than 2 hours to

complete. Interviews were conducted at the University of South Florida in the College of Education in a small conference room.

The Initial Interview Questions (see Appendix E) were centered around participants' motivation and learning. The purpose was to find out if Houle's three distinct learner-types (goal oriented, learner oriented, and activity oriented) are still relevant or have changed over time. The questions' main focus was motivation with a sub-focus on participants' educational experiences, learning processes, reflective thinking, decision-making processes, and involvement in learning.

Follow-up questions (see Appendix F) were asked of each interviewee to confirm any unclear concepts and to dig deeper into previous interview answers on their motivation for continuing to learn. These questions were compiled after the initial interviews had been processed.

According to Rubin and Rubin (2012), interviewing is an exchange through a meaningful relationship where the interviewee is treated as a partner in the research. There was reciprocity because the interviewee had given his/her time, energy, emotion, and creativity. Therefore, the interviewer owed loyalty, protection, and a voice in return.

The interviewees' responses were recorded, transcribed (Appendix H), and member-checked. To ensure the anonymity of the study, only the researcher and the major professor had access to the interview content.

Data Analysis

Data gathered through the questionnaire (Appendix D), initial interviews (Appendix E), and follow-up interviews (Appendix F) were organized, analyzed, and interpreted in an effort to understand and describe educational motivations. The data

were organized and analyzed to answer the research questions, and provisional coding was used. Saldaña (2013) explained that provisional coding has a set of predetermined codes that come from previous research findings in the literature reviewed and are established prior to fieldwork. “Provisional codes can be revised, modified, deleted, or expanded to include new codes” (Saldaña, 2013, p. 144). Provisional coding is considered to be appropriate when a study is building on or corroborating previous research.

Transcribed interview responses were reviewed in relation to Houle’s three learner-types (goal oriented, activity oriented, and learner oriented), looking for key words and phrases that were similar to Houle’s typology descriptions, provided additional explanation, highlighted differences, or seemed to be new factors and/or relevant findings. The coding had a first cycle where the methods were descriptive coding -- going line by line indicating the main point of the sentences and relating those to Houle’s learner-types (goal-oriented, activity-oriented, and/or learner-oriented).

The second cycle of coding included sub-coding using pattern coding to group descriptive codes into sets or themes, and elaborative coding to compare patterns or themes to Houle’s original constructs, looking for additional or new factors that further explain or add to Houle’s original theory. An example of the coding is found in Table 4. Appendix G contains the categorization of participants’ responses within Houle’s framework.

Saldaña (2013) also suggests that a colleague not involved with the study can provide the coder with a reality check to improve the likelihood that the codes used

capture the meaning in what was said. A colleague of the researcher checked themes and codes to verify what the researcher was seeing emerge in the data analysis.

Table 4

Coding Example

Barbara Initial Interview Quote	Paraphrase	First Cycle Coding Connect to Houle's Typology	Second Cycle Coding
<p>“So my personal goals is that it’s--receiving my doctorate, obtaining my doctorate is something that I have always desired. And for the last 17 years, I’ve talked about doing so...And just decided a few years ago that it was time to stop talking about it and to make it happen. And so, it’s something that I’ve always wanted to do and realized that it was more personal than professional...it’s what I wanted to do for myself”</p>	<p>Personal goal to obtain doctorate for the past 17 years</p> <p>Now a personal goal</p>	<p>Goal-oriented learning</p>	<p>Self-fulfillment</p>

Establishing Trustworthiness and Credibility

Creswell (2013) provides five approaches that a researcher can take to establish the trustworthiness and credibility of a qualitative study: (1) saturation in the field; (2) triangulation; (3) member checks; (4) peer review or debriefing; and (5) clarifying researcher bias. These approaches are briefly discussed below to illustrate strategies used by the researcher in this study.

Saturation or engagement with the field includes building trust with participants and checking for misinformation and accuracy in what is presented as participants' perspectives. A pilot test containing proposed interview questions was conducted with six graduate-level students. The questions were asked to see if they were easily understood, and if they were generating relevant answers. Students used in this pilot test found that the questions were easily understood with no additional clarification required, and the researcher found that answers were linked to Houle's three learner-types. To build trust with study participants, the researcher provided interview questions prior to the interview. In addition, to address confidentiality concerns, participants were given pseudonyms, and only the researcher and major professor had access to interview transcripts which were retained on a password secure computer.

Triangulation includes using multiple sources of information. While interviews were the primary data source, two interviews (initial and follow-up) were conducted with each participant, enabling comparison of participant responses both within and across the interview formats. The use of predetermined codes from previous research studies, as well as provisional and sub-coding, enabled multiple opportunities to identify and verify categories, patterns, and themes in the interview data. In addition **peer review** was conducted by a colleague of the researcher who checked themes and codes to verify what the researcher was seeing emerge in the data analysis.

Member-checking was used by providing participants with their interview transcripts to read and verify their answers/statements. The results were then reviewed by the researcher's colleague and major professor.

Lastly, as the researcher I recognize that my preconceptions, beliefs, values, assumptions, and experiences shape my research. **Reflexivity** is a purposeful situating of oneself in relation to the study and acknowledgement of these potential influences. I obtained my master's degree in 2006 in elementary education. I taught elementary students for the next seven years. A natural career progression was to advance into administration; however, I wanted to further my education and continue teaching. I decided to challenge myself in learning to teach adults, so in my third year of teaching, I decided to pursue a doctorate degree in Adult Education.

At work, I volunteered to teach different grade levels to build my understanding of elementary education while I attended doctoral courses at night. During this time, I would describe my motivation as learner-orientated because I wanted to learn about adults and to further my experiences with elementary grade levels.

As an Adult Education graduate student, my interest in Houle's work began in the fall of 2013, after reading *The Inquiring Mind* (1961). As a part of my classwork, I conducted a qualitative pilot study and developed a passion for the topic of motivation of adults' continuous learning. I presented this topic at conferences and received much interest.

Finally, in 2014, I decided that I needed to focus solely on my coursework and dissertation so I resigned from my elementary school work to complete my doctoral program. Since then, I have done poster presentations at conferences, a paper presentation, and had extensive discussions with family, friends, colleagues, and professors; where I received significant feedback and interest. I have had the opportunity to talk first hand with some of the leading adult education contributors. My interest in

my dissertation topic increased greatly, and I was recognized for an outstanding Education Poster at the 2015 Graduate Student and Postdoctoral Research Symposium.

Merriam, Caffarella, and Baumgartner (2007) stated, “Knowing who participates in adult education activities and why adults are participating (or not) is necessary information for both providers and policymakers” (p. 53). As a future adult educator, I want to be able to understand my students’ motivations to learn. Therefore, I believe this study will not only assist with my classroom curriculum, but also inform adult and higher education institutions and the government’s education policies.

I do, however, recognize that as an adult education graduate student in the dissertation process, there may be a tendency to misinterpret responses according to my own biases and experiences. As I was organizing my participants’ interview responses into Houle’s typology, I also reflected on my own motivation for my education. At first my motivation to continue was for a goal so I would be able to teach adults, and now I still have that goal, but it is more of an internal accomplishment for my own satisfaction and self-fulfillment.

Chapter Summary

The chapter began with a description of a pilot study which served as the foundation for the dissertation research. The chapter reiterated the study purpose and research questions, followed by the design of the study which included domains, participant selection, and a brief description of the institutional setting. Data collection and analysis procedures were described. Steps taken to establish trustworthiness and credibility were also described. The next chapter presents the findings of the study.

CHAPTER FOUR

FINDINGS

Over the past 50 years, Houle's typology has been widely applied to various adult learners, not just non-credit seeking adults. What has been lacking is inquiry into contemporary learners' experiences and perspectives to explore whether Houle's typology remains relevant or if changes or additional dimensions are needed. The purpose of this study was to explore why doctoral students continue to participate in formal education.

This chapter provides descriptions of the participants, followed by presentation of the findings in relation to each research question, major themes and conclusions, and finally a chapter summary.

Participants Descriptions

After finishing a master's degree, the six adult learners that were interviewed averaged approximately a 12-year delay before starting doctoral studies. Ann started her doctoral program after 14 years, Barbara after 19 years, Chris after 11 years, David went right on from his master's to his doctorate, Ed waited six years, and Felicia waited 14 years. A multitude of life changes occurred in the span of several years. Following is a description of each of the interviewed participants capturing the different changes they experienced throughout their educational journeys.

Ann. Ann was a 41-year old White female, who was married with two children; one child in elementary school and the other in middle school. She had a master's degree and background in counseling, and she worked as an academic advisor and adjunct professor teaching behavior modification. Ann initially had a difficult start in her undergraduate courses because her parents forced her to attend college against her wishes; the outcome was an initially low grade point average. During her undergraduate degree, Ann worked in the restaurant industry and realized she wanted more for herself, which she indicated required a college degree.

With a new purpose, Ann enrolled in nursing courses, developed supportive friendships, and began to enjoy classes; however, before graduating from the nursing program, she made the difficult decision to change her major to counseling. For her, this was the correct decision because she enjoyed helping people and felt counseling would allow her to do so.

Additionally, Ann realized further education was necessary and enrolled in a master's program. While obtaining her master's degree, she met her husband and had children. After focusing on counseling, her goal was always to obtain a Doctor of Philosophy Degree (Ph.D.). Ann's motivations included making her mother proud, showing her children that she was not a quitter, having her husband call her "Doctor," and following the footsteps of her colleague who had recently obtained a doctorate. Ann recognized that although her children motivated her to complete her education, being a mom was her first priority.

Barbara. Barbara was a 47-year old African American female, who was single and had no children. She had a degree in Public Administration. In the past eight years

of her employment, she had four vice presidents as supervisors. The continuous change had been challenging because, with each change, she was told she might lose her job. She had no one else to rely upon financially. She participated in many professional development leadership activities.

While seeking her undergraduate degree, Ann learned first-hand the importance of having people invest in her when her professor assisted her in building self-confidence. During her master's degree, she worked in the corporate world and helped business owners grow their businesses; however, Barbara did not feel fulfilled by the work.

For seventeen years, she had discussed getting her Ph.D. with her mother, sister, and others. Unfortunately, her mom and sister passed away before she obtained her Ph.D., but she still used them as a source of motivation. Barbara mentored her two nephews, who were the children of her deceased sister; one was in high school while the other was in college. She indicated that these young men were a further motivation for her. Barbara was a very dynamic person who believed strongly in opening doors to help others. She also believed that nothing can stop a person from achieving something if they truly want it.

Chris. Chris was a 44-year old White male, who was married with two elementary-age children. He had a master's degree in Adult Education and was employed as a Social Learning and Community Platform Strategist. His father was a professor.

At the time of the interview, Chris had recently changed jobs and would be moving to another state. He believed strongly in giving back to the community and having empathy for others. These traits, he indicated, were the most important ones he

wanted his children to possess. Chris was looking forward to having his children see him walk across the stage to graduate with his doctorate degree, which he hoped would be memorable for them. Additionally, Chris wanted to instill in his children that it was important for them to strive for the highest level of learning possible. He believed that in order to obtain a doctorate degree, there must be a relentless pursuit and need to contribute back to the field through publications, speaking engagements, or assistance to organizations. Chris believed in a quote that was shared with him by one of his supervisors at work, “With great power, comes great responsibility.”

David. David was a 46-year old Hispanic/White male who was married with two elementary age children. He had a master’s degree in Adult Education and worked as a training manager for a large hotel chain, where he had been employed for 19 years. David worked approximately 50 to 70 hours a week at his job that also required frequent travel. He considered himself introverted, and historically, he had been a “terrible” student that barely finished high school. However, when David returned for his master’s degree, he found he enjoyed the intellectual challenge of learning and wanted to continue his education. His family supported him in achieving his doctorate degree; his children had even attended his doctorate-level courses with him. David indicated this was important to him because when his son was four, he learned his son was autistic and had special needs. To remain close to his children, he took taekwondo classes with them.

David was pursuing a Ph.D. because he wanted to and not because he needed to do so. He set a goal to graduate with his doctorate degree when he turned 45 years old; however, he was going to be 47 years old and was still focused on finishing the degree. David indicated that he was in the job he would be in for the rest of his career, so his

motivation was internal. David stated that the best advice he received was from a human resource representative who asked, “Would you rather be halfway up a ladder you do not want to climb, or would you rather be at the bottom of a ladder you do want to climb?”

Ed. Ed was a 47-year old White male who was married without any children. He had a master’s degree in Student Affairs and his occupation was as an academic advisor. His wife also worked at a university. He enjoyed solving students’ problems and encouraging students to continue their education. Ed believed in giving back to the community and enjoyed helping others, particularly assisting students in their course work. He would like to be an instructor or an administrator and admired and appreciated his professors for their encouragement and advice.

Ed felt that in order to obtain a Ph.D. one requires strong internal motivation. He had been pursuing his doctorate for seven years. Because he has extended the years in achieving his doctorate degree, he has been able to enjoy life and spend time with his wife. His greatest obstacle has been self-confidence; however, through the doctoral program, he felt he has been able to build his self-confidence. Ed stated that he was fortunate to be surrounded by advisors who shared his drive, and therefore, he had a strong support system.

Felicia. Felicia was a 42-year old Middle Eastern female who was married with three children. Her children were in elementary school, middle school, and college. She had a master’s degree in Applied Linguistics and had previously taught English as a Second Language (ESOL) courses at the college level. At the time of her interview, she was working as a graduate assistant.

It was important to Felicia that her children have a home cooked meal at night; therefore, on Sundays she prepared meals for the week for her family. Her family was so supportive that her mom traveled from another country to watch her children while she studied for her qualifying exam.

Felicia described the doctorate program as a very transformative experience where one discovers and rediscovers oneself. Initially, it was difficult for her to return to classes after taking a break from classes for 12 years before starting her doctorate courses. Felicia felt that her middle school child was doing better with his schooling since she started in the doctorate program. She wanted to be a good example to her children; she tells them, “Look at me, I went back to school and I’m pursuing my Ph.D. and I was able to make it.” She loved to take notes in order to learn things.

Three years prior to her interview, she traveled back to her native country and noticed there was a great need for program development, which has been her dissertation topic interest. Felicia also noticed that USF did not offer a non-western perspective of global competences, and she wanted to help make a change in global competence perspective. She indicated that she had gained confidence in her cognitive abilities through her doctoral work.

Research Questions and Findings

Research question 1 – Individual learning characteristics and perspectives.

Participants most frequently described the following learning characteristics and perspectives as important for learning: motivation, determination, desire, drive, focus, stubbornness, prioritizing, and contributing to society. Each of these characteristics is described with best examples provided from participants’ interviews.

Motivation. All participants believed motivation was needed to complete a doctorate degree. For example, Ed stated motivation was in his top three, and Felicia stated motivation was her top characteristic. Barbara stated,

The qualities I think someone needs to possess in order to be in a program, or in order to complete it, or in order to persist in it, is first of all, I think they have to be optimistic about what they're encountering and approaching. I think they have to be confident in their own ability to be successful. And I think they have to be self-motivated. It's an entirely different way of learning, it's different from what we are accustomed to in undergrad or even graduate school. And, you have to be self-reliant. You have to make it happen for yourself. To me the instructors are truly facilitators of knowledge but it's your own personal responsibility to learn the content. So, I think those are some of the things that-- qualities they would have to possess. And, I think motivation, however and whatever it is, that motivates them is -- is the underlying and driving force behind it all.

Chris stated,

I think it's just a relentless pursuit for learning and contributing to your field. So I think that motivation is, it has to be there and it has to be constant. You know, if you're not in it for the long term, it's going to show. And it's going to show probably through the dissertation process, 'cause I think, you know, the courses are a process that we're all accustomed to. And I think the final written exam is a process that we're all accustomed to. But it's, you know, being out on your own and trying to put together a document that you've never done before and may not ever do again, but it's something that you have to and it's very strict. If you're not

able to find it within yourself through the tough days, then you're just not going to finish. So I think that you have to be relentless with that pursuit for learning and then contributing back to the field.

These examples best illustrated the responses from all participants who unilaterally and most frequently used the word motivation as necessary to complete a doctorate degree.

Determination. Determination was another important characteristic that two participants felt doctoral students should possess to complete a doctorate. Felicia and Ed both mentioned determination. However, Ed best described determination as follows:

Perseverance is number one. A certain amount of intelligence but you certainly don't have to be a genius that's for sure. A lot of determination and perseverance, yeah, those are the two. Some creativity and maybe because you're being asked to come up with something that hasn't been done, or come up with a new angle. That's a common thought that goes around when you're trying to come up with your topic. Instead of doing a confirmation study, where you just repeat what was already done, you want to have something that adds to the body of knowledge. Probably every doctoral student has this dream that, "Oh, I'm going to publish that study that is really going to change the field," or something like that. We pretty quickly give up on that notion but I think we still want the idea that, "Okay, this is going to contribute. This is going to have meaning and might even get cited by someone else hopefully."

While Ed's statement best addressed determination, each participant provided related examples of self-doubt or discouragement when they believed they may not have been able to complete a doctorate degree.

Desire. An internal desire to complete the process of obtaining a doctorate was an important learning characteristic that was described as necessary by both Ann and Ed. Ann's statement is most descriptive:

You have to have a desire to want to pursue higher education. It is not easy. It's not hard in the sense that it's mentally challenging to figure out. Like, when you were in statistics class or something, that class was hard, but when you're in high school and trying to learn about anatomy, physiology, it's not mentally draining; it's a time sucker. It's a huge drain on your time. It's a lot of organization. You have to have time. You have to be able to be organized or budget your time wisely. You probably can't have too much going on at your life. You have to -- it's one thing to be able to budget your time, but if you physically don't have the time to participate in the program, you just -- you can't do it or you won't be successful. You have to be driven and I guess that goes to the motivation part. You have to have a drive and a desire to want to complete it. If you're not motivated, you're not -- you're going to not want to complete it or you'd start it and it'll get tossed, because it will get tossed because whatever, because you get cold and you can't get an assignment done and when those tough times come, if you're not motivated to see it through then -- or not desired, to have desire to see it through, then you won't. So I mean, motivation -- without it, you wouldn't do it. You couldn't do it, I don't think.

Desire was an important learning characteristic to complete a doctorate degree. As exemplified by Ann's above statement, there is some overlap between motivation and desire. However, there may be an important distinction between the two despite their similarity: desire is the *want to have* a doctorate degree, while motivation is the *fuel that drives* the participants' *want to earn* a doctorate degree.

Drive. Another learning characteristic needed to complete a doctorate was drive as stated by Ann, Barbara, and Felicia. Ann noted, "You have to be smart, driven, and have a desire to complete it, and without the desire or motivation to see it through, then you won't." Barbara commented that "whatever motivates them is the underlying and driving force." Felicia stated:

Well, certainly motivation should be number one. You really have to be extremely motivated, extremely driven, extremely self-directed because unlike, you know, in my master's -- I'm sorry, especially at this point, where you have to come up with your proposal and do this and do that, it's not like someone is going to walk you through this step and tell you, "Okay, you've got to do this now. And this is how this is done." No, you've got to do it all on your own, so there has to be, like, independent self-directed. It takes maturity, honestly. I can't imagine someone who is not mature and not determined being able to sustain that much pressure and that much work.

Again, motivation is a focus that overlaps drive. Perhaps there is a relationship between motivation and drive where motivation that is not derived from outside sources, is the internal drive that accelerates a person to achieve a doctorate degree.

Focus. The learning characteristic of focus suggests that it is important to keep your eyes on the end goal as described by Ann and Felicia. Felicia succinctly stated, “Staying focused, staying on track. Not losing sight of the end goal or what I’m going to achieve.”

The focus needed to achieve a doctorate is associated with a “sight of the end goal” on a long journey. There may be personal changes and challenges in one’s life that can cause one to lose focus. However, to reach completion, one must remain focused on the ultimate goal which is achieving the doctorate degree.

Stubbornness. The learning characteristic of stubbornness was described as necessary by David and Ed. David’s description is well-stated,

I would say a pretty healthy dose of stubbornness and grit, and, you know, not -- it seems to me that people that get into the program and then don’t continue with it are the folks that potentially got into it for the wrong reason or saw, you know, the program being something, offering something that it doesn’t. So maybe they thought of it as a path to becoming the next CEO of their company and in fact, you’re not going to be. I’m sure rarely you’re going to be a CEO of anything with a PhD, you know, so I think they potentially just got into it for the wrong reason. And then the ones that seem to do well are the ones that are just too stubborn to quit.

Stubbornness was included as a characteristic because it was specifically mentioned by two different participants. There may be overlap between stubbornness, determination, drive and focus where a person must remain “stubborn” or committed to achieve their personal goal of a doctorate degree regardless of outside influences.

Prioritizing. Due to the complexities addressed in numerous issues researched during a doctorate program, the participants described different strategies to reach completion that all fall under the umbrella of prioritizing their work. For instance, Ann stated,

I am a glass half full kind of person. Mentally when I'm faced with a challenging or complex problem, I kind of look at the whole picture and where I want to end up. I work my way backwards from there.

Chris believed in, "breaking it into little categories of first priorities, second priorities, third priorities." Chris also stated, "You've just got to find something to do each day in order to push it forward, even if it's small." David recently encountered a problem, and his "process was to do some research on the internet using industry tools." Ed periodically encounters students that have a complicated schedule, and he will "go step by step with no hasty decisions." Felicia was faced with a difficult course, which she thought of "in terms of an obstacle and I think what can I do to make it simpler."

There appears to be consensus from the participants who described the importance of prioritizing the individual parts in order to achieve completion. All participants believed prioritizing their work was necessary. However, each participant seemed to develop his or her own individual method of prioritizing that worked best for that individual.

Contributing to society. During the interviews, each participant described the desire to contribute to society with the knowledge learned through and accomplishment of a doctorate degree. The participants wanted to assist others succeed and expressed the need to contribute back to their family, field, and community. Some of the ways the

participants described contributing to society included collaborating in state and national conferences, publishing in refereed journals, keynote speaking engagements for organizations, and any additional opportunities that presented themselves.

More specifically, Barbara described her deciding factor to pursue a doctorate after 17 years of wanting one when “several black women that had their doctorates, talked about their path -- wasn’t easy but how it opened different doors for them and allowed them to open doors for other women and men...I can do the same for others.” Chris decided to participate in the doctoral program “to help my family, within the workplace, and I’m also able to contribute back to the field and community.” Chris also described what he felt he would be participating in after obtaining his doctorate, “I will always continue to learn. I will contribute back by publications and speaking at organizations.” Chris noted that a doctoral student needs to have a relentless attitude for learning and then contribute back to society. He also stated, “You’ve just got to find something to do each day in order to push it forward, even if it’s small.”

Participants were not learning for purely their own self-gain, but also genuinely possessed the desire to contribute to society using their doctorate degree as a platform that motivated them to complete their goal.

Other learning characteristics and perspectives. In addition to the eight aforementioned learning characteristics and perspectives, the participants also individually mentioned other important learning characteristics and perspectives they believed were necessary. Following are brief examples of these additional characteristics/perspectives:

Intelligence and creativity. Ed believed one would need to have “perseverance and a certain amount of intelligence.” Ed also thought that “a lot of determination, perseverance, and some creativity” were also needed.

Writing skills and support system. Ann noted that one would “have to have a support system and write well or at least learn to write well.”

Confidence and optimism. Barbara commented that individuals “have to be optimistic about what they’re encountering and approaching. I think they have to be confident in their own ability to be successful.”

These individual learning characteristics and perspectives were personally important to these participants. Perhaps they are connected to each individual participant’s learning style and life experiences.

Summary. A doctoral student should possess an unwavering motivation to achieve completion of a doctorate degree in a continuing process to better oneself and the community. This is exemplified through the learning characteristics and perspectives of motivation, determination, desire, drive, focus, stubbornness, prioritizing, and contributing to society. Participants felt these main learning characteristics and perspectives were necessary as candidates must work independently and have to be self-directed in their learning. Additionally, while participants see these core learning characteristics and perspectives as generally important, they appear to be supplemented with individual learning characteristics and perspectives to fit the individual candidate’s learning style and life experiences.

Research question 1. A. What events or experiences led these education doctoral students to continue their formal education?

As we each have different life experiences, there were various events and experiences that led each participant to continue their formal education. However, commonalities between the life experiences and events included appreciation of education with maturity, expertise, career advancement, and encouragement from others.

Appreciation for education with maturity. Several participants discussed appreciation for education with maturity after obtaining their bachelor's degree. This was best described by David as,

So and you're right and I think my bachelor's, you know, I didn't really want to -- after high school I didn't want to go to college. My parents kind of forced me to go and so yeah, I really wasn't interested in being like the best student I could be. But then between, you know, I finished my bachelor's in 1993 and then I started the master's program in 2007 so what is that? Fourteen years. In that 14 years, you know, I grew up I think quite a bit. I think I understood the value of education when I went back to my master's and then my Ph.D.

Expertise. Other participants also described a desire to become an expert and further their career by obtaining a doctorate degree. This was best exemplified by Chris who stated,

For your bachelor's you come out and you think, "I can accomplish great goals." Then you learn once you get out there that you don't have all the tools that you need. So you go into the master's program and you gain more skills. So you start to accomplish some things and you feel that there is still something out there that I need. And then you get into the doctoral program. You also need to contribute back.

Influence of others. Some adult learners were also influenced by many people throughout their educational careers. Ann had a friend who proved she could obtain a doctorate, and this encouraged her to feel that it was obtainable. Ann stated, “My friend who is just finishing up her Ph.D. said, ‘Time is passing away and you can do this.’”

Ed had a friend who pointed out his strengths and helped him see that he could accomplish a doctorate. Ed stated, “There were some key people in student affairs in particular that encouraged me to keep going, pointed out my strengths that I might not have paid attention to or necessarily thought I had.”

Barbara had a boss give her advice about people who were difficult being responsible for their own difficultness when they do not take it on and that made her be able to move on. Barbara stated, “Take into consideration the person who is bringing whatever it is to the forefront and recognize that belongs to them.”

Chris had a colleague who gave advice that with great power comes great responsibility, and it meant, once you obtain a Ph.D. to give back to your family, the field, and the community. Chris thought that “the power and the knowledge are attaining the highest level of education. I think the responsibility is always to give back.”

Summary. Participants had various events and experiences that led each participant to continue their formal education. Some commonalities included appreciation of education with maturity, expertise, career advancement, and encouragement from others.

Research question 2. How do these doctoral students’ motivation to continue to learn compare to Houle’s non-degree seeking students’ motivation to continue to learn in the non-formal setting?

Houle's three learner-types are goal-oriented learning, activity-oriented learning, and learner-oriented learning. This study found support for goal-oriented learning and learner-oriented learning. However, among the participating doctoral students, Houle's activity-oriented learning lacked support. Since Houle's identification of the three learner-types, subsequent researchers have developed subparts known as descriptors within each of the three main learner-types. In each of the sections that follow, descriptors are italicized, and the source of the descriptor is cited. Then evidence from the interviews in terms of frequency of topic among participants and illustrative examples are provided.

Goal-oriented learning. Goal-oriented learners have clear and defined goals to accomplish. Participants' interviews showed evidence for goal-oriented learning within each of seven descriptors.

Descriptor 1. The adult learner begins with the realization of a need or interest to participate (Houle, 1961). In question 2 in the initial interviews regarding personal goals, all participants spoke of need or interest in obtaining a doctorate degree. Also, in question 11 (about motivation) in the initial interviews, Ann, Barbara, Chris, David, and Ed also referenced their goals for a doctorate. In follow-up interview question 4 about motivation, Barbara spoke of her goal:

...for me, it's just my own personal self-motivation. I wanted to enroll. I've wanted to have a doctorate for years, and my motivation was two-fold. That I wanted to have it before I was 50, and 50's closer than I would like for it to be. And that I wanted to -- to do it, to prove to myself that this was a goal that I could

achieve. And so, my motivation is fulfilling my own personal goal. Yes, it'll help me professionally, but this is more personal for me than anything else.

Felicia stated,

I want to pursue a position in program development. And the reason that I started pursuing my Ph.D. is that I felt after teaching for so many years with my Master's degree, I felt that I wanted to do more. I wanted to move up the ladder and be able to be in a position of management or a higher position. And I felt like working and getting my Ph.D., that would allow me to -- it'll open multiple doors, as they say.

Ann stated,

I want to go on to get my Ph.D., because my plan is to move higher up either in college system, higher education, or maybe private sector, becoming part of their team that leads continuing education or something like that. So educationally speaking, in higher education you really need that upper level of degree to move forward, at least at a university.

Both Felicia and Ann realized that they needed to obtain more education to pursue a higher position. Both understood that in order to go further in either the higher education sector or in the private sector, it was necessary to have both the education and the credentials to succeed. Barbara, however, spoke of her pursuit of the degree as a personal goal, to prove to herself that she could achieve that goal.

Descriptor 2. The adult learner is not steadily or continuously involved in learning (Houle, 1961). In initial interview question 2, all participants spoke of time

away from formal education. In follow-up interview question 4 Barbara and Felicia referred again to this gap.

Felicia stated,

The reason that I started to pursue my Ph.D. is that I felt after teaching for so many years with my Master's degree, I felt that I wanted to do more. I wanted to move up the ladder and be able to be in a position of management or a higher position. And I felt like working and getting my Ph.D., that would allow me to -- it'll open multiple doors.

Barbara stated,

And for the past 17 years, I've talked about receiving my doctorate.

Always wanted to reach this goal for myself and when I moved to Seattle in 1999, from that point forward, I talked about pursuing it and never did.

And just decided a few years ago that it was time to stop talking about it and to make it happen.

Both Felicia and Barbara were away from formal education for some years and decided to come back to complete their doctorates. Both realized that even though they had not been continuously involved in pursuing their doctorate, it was possible to jump back into the formal educational process.

Descriptor 3. The adult learner is not restricted to any activity, to one institution, or method of learning (Houle, 1961). None of the participants provided evidence of this descriptor. This may be an area where there is a difference between non-credit seeking and doctoral students. Non-credit seeking learners can do anything they want for their

knowledge while a degree-seeking student has to follow a specific program of study to obtain the degree.

Descriptor 4. The adult learner had a need or interest that appears to be satisfied by taking a course, joining a group, reading a book, or going on a trip (Houle, 1961). In initial interview question 3 about motivation, all participants provided examples that support this descriptor.

David stated about enrolling for courses, “It may be something that I’m interested or enjoy doing like painting or woodworking. It might help me further my career or get something that might help me in my job.”

Chris stated,

I believe that formal and informal learning are both required to understand the world and how you’re connected to it and how you can make it better.

I think that’s really why you strive for education is to make things better, not only for yourself but for others.

Both David and Chris met their needs at times with both formal and informal learning.

Descriptor 5. The adult learner participates in education to accomplish fairly clear-cut personal objectives (Sheffield, 1964). In initial interview question 2 about personal goals and in question 3 about motivation, all participants made statements reflecting this descriptor. In follow-up interview question 2 about motivation, Ed stated, “I’m hoping to advance to upper level administration in higher education.” Felicia stated, “I want to pursue a position in program development.” Ed and Felicia are completing their doctorate degrees in order to pursue certain careers.

Descriptor 6. The adult learners have a desire to gain certain knowledge or skills in order to improve abilities (Burgess, 1971). In initial interview question 2, all participants made statements supporting this descriptor. In follow-up interview question 8 about change or growth during the doctoral program, Ed stated, “Finishing my master’s I thought I’m done but that wasn’t far enough. I realized that if I want to be a top level administrator that I needed to keep going.”

David stated,

The role education plays in my life, there’s two parts to it. The first is -- now, I’m a student still, at this point, at USF, working on my Ph.D. So that’s one part of it, and then the second part of it’s also part of my job, so learning and development for the company I work for. I’m responsible for other people’s education.

Ed needs more education in order to advance in his career. David sees that his doctoral degree is filling two areas of need for him. One area is for his own personal goal, and the other is to assist him at his current job, teaching others.

Descriptor 7. The adult learners seek professional advancement- job status, job competence, degree, formal requirements, other education (Boshier, 1971). In initial interview question 2 about goals, Ann, Barbara, Chris, Ed, and Felicia made statements supporting this descriptor. In follow-up interview question 2 about motivation, Ann stated, “So educationally speaking, in higher education you really need that upper level degree to move forward, at least at a university.”

Felicia stated,

The reason that I started to pursue my Ph.D. is that I felt after teaching for so many years with my Master's degree, I felt that I wanted to do more. I wanted to move up the ladder and be able to be in a position of management or a higher position. And I felt like working and getting my Ph.D.; that would allow me to -- it'll open multiple doors.

Ann and Felicia want professional advancement; therefore, they realized their need for additional education. Additionally, both Ann and Felicia realized that it is not only the education but the credential that is important.

Summary. Of Houle's three learner-types, goal-oriented learning had the most statements supporting the descriptors of this learner-type. Participants realized they needed to learn more; they liked to be informed. They may not have been consistently involved in learning, and they had different methods of learning; however, they viewed learning as something that might further their careers or make the world better. They had specific goals in mind; they had specific skills to learn; and they understood that obtaining more education could help them achieve their goals.

In this context of an individual deciding to pursue and complete a doctorate degree, there seems to be some overlap between goal-oriented learning and learner-oriented learning. Goal-oriented learning descriptors were also found in participants' descriptions of learning characteristics and perspectives necessary to earn a doctorate degree. Further, participants' life experiences and events supported the achievement of a goal in obtaining a doctorate degree.

Activity-oriented learning. Activity-oriented learners desire social opportunities in the educational setting to provide interactions with others that draw them to learning (e.g., friendship, romantic relationship). Moreover, these learners take part in learning primarily for reasons unrelated to the content of the learning. Although there are other instances in the literature when activity-oriented learning has greater relevance, this study revealed that activity-oriented learning was the least referenced of the three learner-types among the participants at the doctoral level.

Descriptor 1. The adult learners participate socially to meet people and make friends (Houle, 1961). In question 5 (about meaningful learning experiences) in the initial interview, Ann, for example, stated, “It’s nice to be around likeminded people that are excited about the same things.”

In question 6 about teaching methods, Ann, Barbara, Chris, David, and Ed made statements that support this descriptor. Barbara, for example, stated, “I enjoy being around other colleagues. I enjoy hearing and learning from them face to face.” Both Ann and Barbara demonstrated overlap between activity-oriented learning and learner-oriented learning where both enjoyed continual learning and also enjoyed the social setting of interacting with individuals through face-to-face discussions.

Descriptor 2. The adult learner seeks to find a husband or wife, credit, escape problems, carry on traditions or meaningless activity (Houle, 1961). None of the participants made statements supporting this descriptor.

Descriptor 3. The adult learner feels that it is part of their heritage (Houle, 1961). None of the participants made statements supporting this descriptor.

Descriptor 4. The adult learner may not say truthfully about motives to learn (Houle, 1961). None of the participants made statements supporting this descriptor.

Descriptor 5. The adult learner finds success in coursework and not job (Houle, 1961). None of the participants made statements supporting this descriptor.

Descriptor 6. The adult learner has a desire to take part in a social activity as enjoyment for companionship, fellowship, feeling of belonging, approval by others, or positive association with others (Burgess, 1971). In initial interview question 5 about meaningful learning experiences, Ann stated,

I would say, I mean there's been different points in my life where you have this "Ah ha" moment, or something. I guess, I'll go back to when I was in my master's program. When I decided I was going to get a Ph.D., I was just in a classroom, I went to school for counseling, and it was just a great discussion that we had. It was a very small group of students in the program. Probably about twelve of us, and I don't even remember what we were talking about, it was pretty much a daily thing, the whole program. I was very invigorated the whole time, and engaged, and I was excited to learn more. And I knew that I wanted to go back and be able to do what that instructor was doing for us in that classroom like getting ideas that were outside of the box, and really facilitating great learning and some passion in the students. That's probably why it was meaningful to me. 'Cause I was like, "Hey, I want to do this." I definitely feel like this is where I want to go. Ann further discussed fellowship, a feeling of belonging, and a positive association with others by describing her conversation with her classmates.

In initial interview question 6 about teaching methods, Chris and David made statements supporting this descriptor. Chris, for example, discussed how “working with different people on projects helps you learn from other people’s experiences. You also get to know the individuals, so there is a lot of social networking.” Chris explains how working on projects gave him a positive association with his classmates.

Descriptor 7. The adult learner seeks community service through citizenship, community service, mankind, insight, human relations, supplemented education, life center, and education centers (Boshier, 1971). None of the participants made statements supporting this descriptor.

Descriptor 8. The adult learner seeks social stimulation, has a social contract, an external expectation, and/or community service that encourages them to participate in learning (Gordon, 1993). Participants referenced external expectations in several responses: Ann in initial interview question 5; and Ann, Barbara, Chris, David, and Ed in initial interview question 6. Barbara, for example, spoke of the influence of her two nephews who were her “greatest supporters”:

I would say my two nephews. My sister's kids. They were excited and very proud of the fact that I decided to go back and pursue my PhD. I've been talking about entering a doctoral program for years with them. My oldest nephew attended the University of Washington and my baby nephew will be graduating from high school next month. And I feel as though they're my greatest supporters, and I also do it because of them. I want them to know that, regardless to when you choose to return to school, that it's possible and to never stop until you achieve the dreams that you want. So they're excited when I show them that

I've gotten a 4.0 for the semester and they cheer me on and tell me how proud they are of me. And I consider them my kids and so I think they're my greatest supporters, but they're also my motivation, or part of my motivation.

In initial interview question 11, Felicia stated, "I find it to be fun to be in class with people who are like me. I have tremendously enjoyed being in classes, communicating and conversing with people with the same interests."

Barbara has an external expectation from her two nephews to continue to learn. Barbara sees her nephews as her own children. She wants to be a good role model and set a good example for them. Felicia continues to learn by social stimulation from her peers; her peers help motivate her to continue her education.

Descriptor 9. The adult learner has a societal-goal orientation where they participate in education to accomplish clear-cut social or community objectives (Sheffield, 1964). None of the participants made statements supporting this descriptor.

Descriptor 10. The adult learner has a desire to reach a social goal which can be pressure exerted by acquaintances, friends, relatives, or society as a whole (Burgess, 1971). In Burgess' explanation of this descriptor, he appears to imply more of a "negative pressure." The participants interviewed discussed more of a family role model and "positive pressure." This was referenced by several participants: Ann and Chris in initial interview question 2 about goals and Ann in follow-up question 2 and 4 about motivation; Ann in initial interview question 3 about motivation; Felicia in initial interview question 9 and 13 about learning experiences/activities; and all participants in initial interview question 14 about being motivated by others and in follow-up interview question 12 about motivating others.

Ed, for example, stated, “For supportive, I would say that obviously my spouse, my family members, my committee members, even my department where I work, my colleagues are supportive, so yeah, I would say pretty much surrounded by people who are supportive.” Ann stated, “I want to make my kids proud of me. I mean, that’s personal, I want to start something and finish.” Participants always discussed their family, friends, and colleagues wanting them to succeed and accomplish their goals.

Descriptor 11. The adult learner has the desire to comply with formal requirements- desire to earn a certain degree required by employer, meet certain conditions required by certain groups, meet requirements of a judge, a social welfare worker, or some other authority (Burgess, 1971). None of the participants made statements supporting this descriptor.

Descriptor 12. The adult learner participates in learning for external expectations such as a recommendation, to comply, being instructed, for competition, to keep up, and/or as a social pressure (Boshier, 1971). None of the participants made statements supporting the descriptor.

Descriptor 13. The adult learner participates by taking part because in the circumstances of learning an introspective or intrapersonal meaning is found which may have no necessary connection, and often no connection at all, with the announced purpose of the activity (Sheffield, 1974). None of the participants made statements supporting the descriptor.

Descriptor 14. The adult learner has the desire to escape as an activity, a situation, to avoid unpleasantness, or tedium (Burgess, 1971). None of the participants made statements supporting the descriptor.

Descriptor 15. The adult learner participates as a social stimulation from boredom, frustration, a break from routine, or as an escape (Boshier, 1971). None of the participants made statements supporting the descriptor.

Descriptor 16. The adult learner participates as a religious goal, to escape, as a required activity, or a social pressure (Houle, 1983). None of the participants made statements supporting the descriptor.

Summary. Activity-oriented learner did have some statements supporting the learner-type from the participants; however, of Houle's three learner-types, it had the least evidence. There were 15 total items, and only three had supportive statements. Descriptors that were referenced included: participates socially to meet people and make friends; the desire to take part in a social activity- enjoyed for companionship, fellowship, feeling of belonging, approval by others, or positive association with others; and social stimulation, social contract, external expectation, community service.

Perhaps doctoral students are not as in need of social interactions as Houle's non-degree seeking students. Or, perhaps it is the nature of doctoral study that creates a context much different from non-degree seeking learners. In order to enroll in a doctoral program, for example, one has to fill out an application and be accepted. This process greatly reduces the number of individuals eligible for admission. Additionally, a doctoral degree is expensive, not only in monetary value but in time. The time commitment is not only for studying but taking away from the individual's personal life because most doctoral students are older and have a family and are employed. Lastly, doctoral students have a time limit on obtaining their doctorate degree which is another form of pressure.

Burgess (1971) described the adult learner as having a desire to reach a social goal which can be pressure exerted by acquaintances, friends, relatives, or society as a whole. These pressures appeared to be presented as more of a negative peer pressure. Participants in this study, however, spoke of positive pressure, often from family and friends but also from responsibility they felt to be a role model.

Learner-oriented learning. Learning-oriented students have a love for learning and view learning as a habitual activity (e.g., students who always carry a book with them).

Descriptor 1. The adult learner participates by joining groups or classes for educational reasons (Houle, 1961). In initial interview question 2 about goals and in question 3 about motivation, all the participants made statements supporting the descriptor. In follow-up interview question 4 about motivation and in question 5 about motivation as a quality for doctoral work, all the participants made statements supporting the descriptor. David, for example, stated, “my own self-motivation and something I’m interested in or enjoy doing.” Ann stated, “I want to go on to get my Ph.D., because my plan is to move higher up either in the college system, higher education, or the private sector.” Just as learner-oriented students in other studies have a love of learning, so do doctoral students who go on to take additional years of formal education.

Descriptor 2. The adult learner has a constant goal rather than continuous (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 3. The adult learner is an avid reader, since childhood (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 4. The adult learner selects serious programs on television (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 5. The adult learner's job was selected for potential growth (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 6. The adult learner plans trips out for what they will see (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 7. The adult learner has the desire to know (Houle, 1961). In initial interview question 11 about motivation to learn, Barbara stated:

So I think there are many things that motivate me to learn. First, I would say that I like to know things. I like to be informed. I like to have insightful conversations. I like to hear different perspectives. I like to challenge myself and I like to be well-informed. And no one's going to know everything, but I wanna know what I know and be comfortable and confident in my knowledge base pertaining to that particular area. So I like to learn and I like to challenge myself, and that's what motivates me to continue learning.

In follow-up interview question 5 about motivation for doctoral students, all participants made statements supporting the descriptor. Barbara, for example, stated, "I like to know things. I like to be informed. I like to have meaningful conversations." Ann stated, "It's nice to be around like minded people who are excited about the same things you are but maybe have a different point of view too." Both Barbara and Ann enjoy understanding more about the world from others.

Descriptor 8. The adult learner is preoccupied with learning (Houle, 1961). In initial interview question 5 about meaningful learning experiences, Chris made a

statement supporting the descriptor. In the follow-up interview question 5 about motivation for doctoral students and in question 10 about continuing to learn after completing the doctorate, all the participants made statements supporting these descriptors. Barbara, for example, stated, “I will continue to take advantage of professional development opportunities. I will continue to be part of professional development organizations and what opportunities present themselves.”

Felicia stated,

I remember sitting down and reading and rereading those packages so many times, I feel like I was training my brain -- retraining my brain during that first course. At the same time, it really intrigued me to know more. What could be learned more about adult education and how can I make sense of what I'm learning to make it work for me.

Both Barbara and Felicia are preoccupied with learning because as a doctoral student learning is habitual. Doctoral students have a desire to understand and know more about what they do not know and what they need to know.

Descriptor 9. The adult learner's learning is their way of having fun (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 10. The adult learner's self-concept is that they are different from others (Houle, 1961). None of the participants made statements supporting the descriptor.

Descriptor 11. The adult learner's learning-orientation is to take part because in the circumstances of the learning and interpersonal or social meaning is found which may have no necessary connection at all with the content of the announced purposes of

the activity (Sheffield, 1964). In initial interview question 5 about meaningful learning experiences and in question 9 about thinking and reflecting, Felicia made statements supporting the descriptors. Felicia stated, for example, “The whole experience itself, helps you put things in perspective. It helps you develop at the personal level and at the professional level.”

In follow-up interview question 2 about motivation, Ann stated, “I’ve always known I wanted to go back for this Ph.D. -- there’s something about the prestige that carries with it. Whether that’s a selfish motivation or not, I want to be called ‘Doctor.’”

Felicia and Ann appear to be earning more than just their doctorates. Felicia’s circumstances gave her insights, both personally and professionally. Ann feels the prestige of being called “Doctor”; this for her is recognition that all her hard work and sacrifices were worth it.

Descriptor 12. The adult learner has the desire to know as an intellect appreciation, pleasure from learning, enjoy mental exercise, and remain in command of learning (Burgess, 1971). In initial interview question 11 about motivation, Barbara and Felicia made statements supporting this descriptor. In follow-up interview question 1 about philosophy of education, Ed made a statement supporting the descriptor. In question 2 about motivation, Barbara made a statement supporting the descriptor. In question 4 about motivation for the doctorate, Chris and Ed made statements supporting the descriptor. Chris stated, for example, “Learning can be fun, it can be cool. And that you should always be pushing yourself to learn more and more and more.” Ed stated,

I view education as primarily something to—a means to an end where you try to improve yourself, you try to grow as a person. Hopefully that’s sort

of like a self-actualization or something. It's not just, 'I need credentials for x, y, or z,' but it's because you enjoy the process or you enjoy the outcomes once you've mastered the material. So for me, education is just about ongoing growth and development.

Both Chris and Ed view education as enjoyable and as improving themselves. All participants expressed a great love of learning and the pursuit of knowledge that Houle referenced.

Descriptor 13. The adult learner participates for a cognitive interest such as for their own sake, inquiring, joy in learning, and/or community intent (Boshier, 1971). In the initial interview question 3 about motivation and in question 12 about deciding to pursue the doctorate, David made statements supporting the descriptors. In follow-up interview question 2 about motivation, Barbara stated, "For me it's just my own personal self-motivation."

David stated,

For me, it was a personal drive to complete my doctorate. So maybe a surprise, maybe no surprise, at all, but I've always been a terrible student. I barely got through high school. I barely got through my undergrad, it was just maybe my attitude at the time. So when I went back for my master's I really enjoyed it. It was—just going back to school was a different experience than I had when I was younger, and then, I sort of didn't want to stop.

Both Barbara and David are motivated to participate in their doctorates because they have a self-motivation. David goes on to state that even though he started as

a poor student, he went on to gain the joy of learning and thirst for knowledge to obtain his doctorate.

Descriptor 14. Adult learners participate to be self-directed (Brockett & Donaghy, 2011). In initial interview question 3 about motivation and in question 12 about deciding to pursue the doctorate, David statements supporting the descriptor. In follow-up interview question 2 about motivation, Barbara made a statement supporting the descriptor. Chris stated, “I just started with a new company and they promote self-directed learning. They encourage employees to be innovators and taking the initiative yourself to learn things.”

Ed stated,

I’m hoping to advance to upper level administration in higher education and I guess education’s always been important to me except for maybe that period when I was finishing up my bachelor’s and I thought, ‘Well I’m done.’ But since that time, my perspective changed and basically embraced the idea that I would keep learning whether it was formally or maybe my own self-directed learning.

Both Chris and Ed realize that participating in learning at the doctorate level is self-directed.

Learner-oriented learning had greater support than activity-oriented learning, but less support than goal-oriented learning. All participants enjoyed continuous learning. Some doctoral candidates may have entered into the doctoral program as learner-oriented learners, but evolved into goal-oriented learners based upon the time limit and program framework imposed upon the candidates in the doctoral program.

Summary. Interview responses were analyzed for goal-oriented learning, activity-oriented learning, and learner-oriented learning. In goal-oriented learning, responses included external rewards of job advancement, more money, and title. For activity-oriented learning, responses included enjoying being around like-minded people, hearing different outlooks, support systems, and classmates' influence. Activity-oriented learning had less support among the participants who were doctoral candidates than the non-degree students in Houle's study. Perhaps Houle's students were motivated and needed activity-oriented learning as part of their learning while for the doctoral students, activity-oriented learning was not as important. For learner-oriented learning, responses included interest in topics; personal drive; continually searching for answers and contributions; internal focus; challenging self; knowing more; hearing different outlooks; and knowing there is more to learn.

Research question 2. B. Are there any new learner-types that will add and update Houle's typology?

Self-fulfillment. Throughout the participants' interviews there were many references to proving themselves, independence, and self-improvement:

Initial interviews. Question 3 about motivation (David); question 5 about learning experiences (Felicia); question 9 about educational experiences (Barbara and Felicia); question 11 about motivation to learn (David); question 12 about decision to pursue the degree (Barbara and David); and question 13 about participation in learning activities (Felicia).

Follow-up interviews. Question 4 about motivation (Ann, Barbara, and David); question 8 changes during the program (Ed); and question 17 about other comments (David and Ed).

Some examples of the supported statements were:

Felicia stated, “I think going back to school helped me discover myself and also helped me relate to others at a different level.”

Barbara stated her motivation behind earning her doctorate, “For me, it’s just my own personal self-motivation.”

David stated, “So motivation for me has all been internal. I’m motivated by my own personal drive just to complete it and get it done.”

Ed stated, “The big difference is the internal component. If you don’t have something driving you from the inside, I don’t think you’ll get through it.”

Self-fulfillment should, perhaps, be recognized as its own learning motivation. Self-fulfillment is more than being goal-oriented, associated with an activity learner (being social), or being learning oriented (love of learning). Self-fulfillment has a deeper meaning where the adult learner has an internal transformation. Unlike self-actualization, where an individual is at his or her peak performance through learning, self-fulfillment is when an individual has changed internally with learning. Self-fulfilled learning is the process of obtaining a goal, associated with activity learning, and part of learning-oriented learning. In the interviews, the participants discussed proving themselves, transformation, self-improvement, and internal desire.

One addition under social-oriented learning was that adult learners set a goal to finish and can be an example for their children. Burgess (1971) added to Houle’s

activity-oriented learner the desire to reach a social goal-pressure exerted by acquaintances, friends, relatives, or society as a whole. This social pressure has been associated with a negative peer pressure. According to the interviewees in this study, as the desire to be a positive role model for one's children and family was seen as a positive rather than a negative pressure. For example,

Ann stated, "I want to go on to get my Ph.D., because my plan is to move higher up either in the college system, higher education, or maybe private sector...I want to make my kids proud of me. I mean, that's personal, I want to start something and finish."

Chris stated,

I want a fulfilling life for my wife and children and instilling a sense of empathy for others, contributing back to the community, emphasizing physical activity, because I think that is part of a good lifestyle, and also incorporating life-long learning. That's kind of why I got into the Ph.D. program to instill that in my children and now that they are the point where they'll really remember it is that helpfully when they see their father walk across the stage.

Major Themes and Conclusions

Seven major themes were discovered: (1) goal-oriented learning; (2) activity-oriented learning; (3) learner-oriented learning; (4) role modeling; (5) contributing to society; (6) self-confidence; and (7) self-fulfillment.

Goal-oriented learning. All the participants discussed their goal to obtain a doctorate in the interviews. Ann stated, "So educationally speaking, in higher education you really need that upper level degree to move forward, at least at a university." So, in

order to advance, Ann had to start her doctorate. Barbara stated that she is completing her doctorate “for my own personal self-motivation.” Chris stated,

I want a fulfilling life for my wife and children and instilling a sense of empathy for others, contributing back to the community, emphasizing physical activity, because I think that is part of a good lifestyle, and also incorporating life-long learning. That’s kind of why I got into the Ph.D. program to instill that in my children and now that they are the point where they’ll really remember it is that helpfully when they see their father walk across the stage.

David stated, “There’s two parts that education plays in my life. The first is I’m working on my Ph.D. and the second part is part of my job, so learning and development for the company I work for. I’m responsible for other people’s education.”

Ed stated, “I’m hoping to advance to upper level administration in higher education.” Felicia stated, “The reason that I stated pursuing my Ph.D. is that I felt after teaching for so many years with my Master’s degree, I felt that I wanted to do more. I wanted to move up the ladder and be able to be in a position of management.”

Responses of interviewees suggest that doctoral students are goal-oriented learners. Each participant described his or her reasoning for pursuing the doctorate, which included their goals for an advanced degree, job advancement, self-fulfillment, and contributing to the community.

Activity-oriented learning. All the participants discussed how they enjoyed being around their colleagues. Ann stated, “It’s nice to be around likeminded people that are excited about the same things.” Barbara stated, “I enjoy being around other

colleagues. I enjoy hearing and learning from them.” Chris discussed how “working with different people on projects helps you learn from other people’s experiences. You also get to know the individuals, so there is a lot of social networking.” David stated, “I tend to learn more from my peers and just exploring a topic with others than I do from reading or watching a presentation.”

Ed stated,

For supportive, I would say that obviously my spouse, my family members, my committee members, even my department where I work, my colleagues are supportive, so yeah, I would say pretty much surrounded by people who are supportive.

Felicia stated, “I find it fun to be in class with people who are like me. I have tremendously enjoyed being in classes, communicating and conversing with people with same interests.”

Examples such as these illustrate that these doctoral students were all activity-oriented learners. One can surmise, that as one advances in education, he/she will do so because he/she enjoys learning. These are individuals who like to converse and hear insights of others. They enjoy being around like-minded colleagues, and they feel that they learn a lot from their experiences.

However, it should be noted that of Houle’s three learner-types, activity-oriented learning had the least evidence. There were 15 total items, and only three had supportive statements.

Learner-oriented learning. All the participants described what motivated their learning. Ann stated, “My kids would come into play because it’d be hard to say I’m not

going to school anymore unless I had a good reason.” Barbara stated, “I like to know things. I like to be informed. I like to have meaningful conversations.” Chris stated, “Learning can be fun, it can be cool. And that you should always be pushing yourself to learn more and more and more.” David’s learning was a joy; he stated, “It’s an internal drive and beyond that my kids would be a motivator as well.” Ed stated, “I go to trainings that the university provides and trainings from professional organizations relevant to occupation, and staff development.” Felicia found personal meaning and stated, “The whole experience itself, helps you put things in perspective. It helps you develop at the personal level and at the professional level.”

These examples point to the idea that if someone is going on to obtain a Ph.D., the highest level of education, an individual would have to love learning. The learner-oriented learner can be: pushing yourself to learn more, your children pushing you to be a role model and show them you can do it, an internal drive a feeling of accomplishment (self-fulfillment), attending trainings to learn more about your field of study, and reflecting on your experience and knowing you have grown.

Role-modeling. Rather than being an obstacle to continue their education, the participants found their children to be a motivating factor. The participants discussed how their children kept them motivated because as parents, it is important to set a good example. Through trying to set a good example, adult learners will not quit and work harder to show their children it can be accomplished. Ann stated, for example,

I missed the opening games of baseball because I was—had some—I had a test that I had to prepare for or something like that. Opening season

game, and I was like, I'm not doing this. But then, on the other hand, the motivation for my kids. I can't quit.

Chris stated,

I want a fulfilling life for my wife and children and instilling a sense of empathy for others, contributing back to the community, emphasizing physical activity, because I think that is part of a good lifestyle, and also incorporating life-long learning. That's kind of why I got into the Ph.D. program to instill that in my children and now that they are the point where they'll really remember it is that helpfully when they see their father walk across the stage.

Felicia stated,

One of the benefits that the whole Ph.D. has brought is that because they (kids) see how hard I work, I think that has influenced my 13 year old in a very positive way that she's working super hard now compared to 2013 when I was not pursuing my Ph.D.

David stated,

So starting with supporters, it's definitely my wife comes first and then, very easily I can say my kids. My son is 13 and my daughter is 9, and they've even gone to class with me.

Four of the six participants had children and stated that being a good role-model for their children was a priority. A statement that came up a lot was not quitting because the doctoral students did not want their children to think it was permissible to quit.

Participants also wanted to have a good lifestyle for their children and show that working

hard and contributing back was important. One participant discussed how her child was following her example from starting the doctoral program and working harder in his schooling. Another took his children to class with him, which would be a great experience for the children to watch their parent as a student.

Contributing to society. Pursuant to Stein, Trinko, and Wanstreet's (2008) social capital is when students engage with likeminded adults and take an active interest in the community to make a difference. Many of the graduate students want to help others and contribute to the field of education. Barbara stated some advice from a supervisor:

Allow your education to be the stepping stone to the plethora of doors that will open for you. She meant, your continuous leaning an application of that learning that is your gift, and your knowledge, and your expertise will ultimately make room for you and allow those doors to open for you....Once you get a doctorate what do you do with it? How do I use that to change lives that are coming into education behind me?

Chris stated, "So a little bit of two-fold where I think it's going to help me within the workplace, but I'm also able to contribute back to the field." Ed stated, "To your field it may be research papers and work, et cetera. But I think it's just knowing that you have a great responsibility after attaining this great goal."

These graduate students felt that they had a lot of credibility to make changes and to do something good. They wanted to make a difference. They felt that their degree made them owe contributions to society.

Self-confidence. Self-confidence gained was interesting because the doctoral students did not realize that this would be a benefit that was earned throughout the process of obtaining a doctorate. They gained self-confidence with every step toward their doctorate. Felicia stated, for example, “I’m more confident in myself and in my thinking—my cognitive abilities.” This could come from having to know your dissertation topic and to be able to share it with others through writing and presentations.

David stated,

Initially in the program I used to get very frustrated with some of the projects that we had and you’d have to team up with folks to do a paper or present back. I’m an introvert so I ‘m not a social person so I don’t always like to work with people so I’ve had to adapt and become a little bit more social and outward focused than I am. Throughout the program, I had to be in group presentations and it is always helpful to hear other perspectives. Also, to connect with others since a lot of the program is on your own especially the dissertation. Throughout my group projects, I met some amazing colleagues and we have remained friend.

Ed stated, “I’m much more confident in my abilities. I’m less concerned about comparing myself to other people as far as, ‘Am I as smart as they are? Am I going to have the ideas that are necessary?’” At the beginning of the anything new, most people will compare themselves to others. As one progresses in something new, they will gain confidence in the new material acquired and be able to discuss it openly. When someone is comfortable expressing their thoughts, they start to gain self-confidence. The self-

confidence can be surprising when you do something you did not think you would be able to do.

After these doctorate students reflected on their learning, they realized that they were more confident than in the beginning of their programs. They gained the confidence from projects; understanding and knowing their topics better; going through the program; and accomplishing different requirements such as a qualifying exam.

Self-fulfillment. A couple of the students described wanting a doctorate for years. Also, they described an internal drive and wanting to prove they were able to accomplish a doctorate. For example, Barbara stated, “When I went into corporate America, I enjoyed helping the business owners grow their businesses, but it wasn’t fulfilling. I decided to do some reflection and ...take a few courses.” Ed stated, “Before I wanted to get my bachelor’s for my family. I wanted them to see that I could be successful. I wanted them to be proud of me, and now I’m doing it for myself.” David stated, “So motivation for me has all been internal. I’m motivated by my own personal drive just to complete it and get it done.” Chris stated, “I know some of it is intrinsic because I like knowledge, I like learning and that has something to do with it.” Ed stated, “The big difference is the internal component. If you don’t have something driving you from the inside, I don’t think you will go through with it.”

Doctoral students appear to have an internal sense of accomplishment. Earning a Ph.D. can take many years, with many struggles and successes; after obtaining a Ph.D., one would feel very proud of themselves.

Table 5 contains the number of times the participants discussed the new themes of role modeling, contributing to society, self-confidence, and self-fulfillment.

Table 5

Number of Times Participants Discussed New Themes

New Themes	Initial Interview	Follow-up Interview	Total Participants
Role modeling	8	9	17
Contributing to society	5	9	14
Self-confidence	12	3	15
Self-fulfillment	5	9	14

Chapter Summary

Participants had strong motivations that compelled them to pursue their education at the highest level. Houle’s typology seems relevant (or descriptive) of adults pursuing doctorates in formal education. However, for the participants, four additional themes emerged from the interviews. First, motivation included participants’ setting a good example for their children by being a good role model. Second, participants were motivated to achieve their doctorate so they would be contributing to society. Third, the motivation of the participants in the program helped them gain self-confidence. Fourth, self-fulfillment was a strong motivator to pursue a degree. The initial three learner types (goal-oriented learning, activity-oriented learning, and learner-oriented learning) were present for entering into the program, but activity-oriented learning was less frequently illustrated. The last four mentioned (role-model, contributing to society, self-confidence, and self-fulfillment) were present for continuing in the doctoral program.

CHAPTER FIVE

DISCUSSION AND CONCLUSIONS

Adult motivation to continue advanced education has been a topic of interest for years, and it continues to be researched and discussed. For this study, Houle's widely recognized typology of adult learners was used to examine its relevance for contemporary doctoral students. Six doctoral students, who were age 40 or older, were interviewed concerning their motivation in continuing to learn. The purpose of this study was to explore why doctoral students continue to participate in formal education.

This chapter provides a discussion of the research questions, followed by methodological limitations of the study, then implications for practice, next recommendations for future research, and finally a chapter summary.

Discussion

Research question 1 – Individual learning characteristics and perspectives.

A doctoral student should possess an unwavering motivation to achieve completion of a doctorate degree in a continuing process to better oneself and the community. This is exemplified through core learning characteristics and perspectives described by study participants: motivation, determination, desire, drive, focus, stubbornness, prioritizing, and contributing to society. Participants felt these main learning characteristics and perspectives were necessary as candidates must work independently and be self-directed in their learning. Additionally, while participants see

these core learning characteristics and perspectives as generally important, they appear to be supplemented with individual learning characteristics and perspectives that fit the individual candidate's learning style and life experiences. The additional characteristics and perspectives described are intelligence and creativity, writing skills and support system, and confidence and optimism.

Reflecting on Maslow's (1954) pyramid, the participants interviewed were beyond basic needs, physiological needs, safety needs, and belonging needs. Similar to Maslow's actualizing tendency, some of the participants discussed accomplishments that they felt were unachievable such as passing statistics and/or their qualifying exam.

Three participants noted that throughout the process of trying to obtain a doctorate degree, they gained self-confidence and better writing skills. Gaining self-confidence may not have been a specific goal for obtaining a degree. These students may have experienced self-actualization because when people use their talents and potential to the best of their ability, they can surprise themselves with what they accomplish.

In Maslow's pyramid, however, esteem needs precede the actualizing tendency, and one of the esteem needs listed is self-confidence. For these three participants it appeared to be the other way around. For a doctoral student to achieve the highest level in education, the student must possess some unyielding self-motivation which can manifest itself through determination, desire, drive, focus, stubbornness, and self-confidence.

This research pertaining to doctoral students partially confirmed the prior study of Stein, Trinko, and Wanstreet's (2008) PRiSM model. Participants in this study emphasized a desire to contribute to society as one motivation for pursuing the doctorate.

Stein et al. suggest that “enrollment in formal higher education is a decision made on the basis of existing social capital, networks of community, family, occupational support, and acquired educational capital... Social capital includes the knowledge and networking resources that reside in and are available for adults to use toward the common good” (p. 6). Participants in this study valued studying with likeminded adults who share a common goal to take responsibility for issues affecting their individual lives and the relevant field of study and have a strong desire with a higher level of education to contribute back to society.

Further this research supported Brocket and Donaghy’s (2011) perspective regarding self-directed learning in adults. They claimed that since Houle (1961) stated that learner-oriented individuals can be associated with having the “desire to know information,” they are therefore responsible for their own learning as a self-directed learner. Thus, according to Brocket and Donaghy, Houle was the first to delineate self-directed learning as a characteristic of adult learners.

Rogers (1951) also showed that self-directed learning was applicable to adult learning characteristics. Rogers’ (1951) book, *Client-Centered Therapy*, showed that people have a desire to be at their highest potential and become the best people they can (e.g., an actualizing tendency). He notes that the client-centered therapist should not direct the client, but instead the client should be the one who is in control. When the client is in control and making his/her own decisions, he/she is self-directed. When a client achieves his/her potential, he/she is experiencing actualizing tendency.

Additionally, this study also supports Lewin (1963) discussion of how an individual’s behavior is the interaction between the individual and the environment.

Lewin stressed the importance of individual personalities, interpersonal conflict, and situational variables. He presented the idea that behavior is the result of the interaction between the individual and the environment, surmising that motivated adults acquire knowledge best when they are using what they learn to connect to their lives. In this study participants wanted to assist others succeed and expressed the need to contribute back to their family, field, and community. Participants may be self-directed, but they were not learning for purely their own self-gain, but had the desire to contribute to society using their doctorate degree as a platform. This motivated them to complete their goal.

In conclusion, this study revealed that a doctoral student must possess a strong motivation which can manifest itself through determination, desire, drive, focus, stubbornness, and self-confidence. This strong motivation can be found at the top of Maslow's pyramid where self-confidence is an esteem need supporting self-actualization. Also, doctoral students have a strong motivation to contribute to society, which includes their family, the field, and their community. This represents social capital as noted in the PRiSM model where knowledge and resources are used toward the common good. Additionally, a doctoral student has to be self-directed in their learning to further their learning and accomplish their goals.

Research question 1. A. – Influencing events or experiences.

Participants had various events and experiences that led each participant to continue his or her formal education. Some commonalities included appreciation of education with maturity, expertise, career advancement, and encouragement from others.

Taking a look at the psychology of motivation literature, Lindeman (1926), speaking exclusively from an adult education perspective, discussed the importance of hands-on learning and meeting learning interest. The participants in this study discussed wanting to learn by doing. Participants stated that during their bachelor's degree, they did not have a learning interest and were not motivated. In contrast during their master's and doctorate programs, they were interested in the learning.

Based on the literature reviewed regarding participation models, specifically Cross's (1981) Chain-of-Response (COR) model, the participants started with letter (A) self-evaluation, and participants went through the process of determining whether to participate. Continuing to letter (B) attitudes about education as to whether to participate or not, the participants discussed how their attitudes regarding education evolved from their bachelor's to their doctorate. Some stated that during their bachelor's degree, they were not good students and went to college for their parents. Next letter (C) importance of goals and expectations that participation will meet goals, all the participants decided to participate due to their strong goals. The doctoral students were beyond A and B and most likely beyond C since they were already in their doctorate program. In letter (D) life transitions (e.g., change job, divorce), two of the participants discussed how their life changed during seeking their doctorate. Chris started a new job, and Barbara discussed how she was working for a new vice president. Finally, letter (E) opportunities and barriers (e.g., family) represented family. Family seemed to impact many of these doctoral students' participation, especially when they discussed how their children made it challenging, but also how they wanted to set an example for their children. Additionally, similar to Cross' (1981) Characteristics of Adult Learners (CAL) model,

many participants discussed life phases and developmental stages reflecting marriage, children, and/or career choices throughout their pursuit of their doctorate.

In conclusion, life events and experiences have already been found as an encouraging factor for continuing education, and this research confirmed this prior theory as still being relevant.

Research question 2. – Doctoral students’ motivation to continue to learn compared to Houle’s non-degree seeking students’ motivation to continue to learn in the non-formal setting.

Houle’s three learner-types are comprised of goal-oriented learner, activity-oriented learner, and learning-oriented learner. Of Houle’s three learner-types, goal-oriented learning had the most statements supporting the descriptors of this learner-type. Participants realized they needed to learn more; they liked to be informed. They may not have been consistently involved in learning, and they had different methods of learning; however, they viewed learning as something that might further their careers or make the world better. They had specific goals in mind; they had specific skills to learn; and they understood that obtaining more education could help them achieve their goals.

In this context of an individual deciding to pursue and complete a doctorate degree, there seems to be some overlap between goal-oriented learning and learner-oriented learning. Goal-oriented learning descriptors were also found in participants’ descriptions of learning characteristics and perspectives necessary to earn a doctorate degree (e.g., self-motivation, career advancement, needing to know a body of knowledge, and contributing to family and society). Further, participants’ life experiences and events supported the achievement of a goal in obtaining a doctorate degree. However, taking a

look at *Descriptor 3 under Goal-oriented Learning - The adult learner is not restricted to any activity, to one institution, or method of learning* (Houle, 1961), none of the participants provided evidence of this descriptor. This is an area where there is a difference between non-credit seeking students in Houle's study and the doctoral students participating in this study. Non-credit seeking learners can enroll in anything they want to obtain their desired knowledge while a degree-seeking student has to follow a specific program of study to obtain the degree.

Activity-oriented learners did make some statements supporting the learner-type (e.g., meeting people, a sense of belonging among like-minded people, expectations of family, and desire to be a role model); however, of Houle's three learner-types, it had the least evidence. There were 15 total items, and only three had supportive statements. Descriptors that were referenced included: participates socially to meet people and make friends; the desire to take part in a social activity- enjoyed for companionship, fellowship, feeling of belonging, approval by others, or positive association with others; and social stimulation, social contract, external expectation, community service.

Perhaps doctoral students are not as in need of social interactions as Houle's non-degree seeking students. Or, perhaps it is the nature of doctoral study that creates a context much different from non-degree seeking learners. In order to enroll in a doctoral program, for example, one has to fill out an application and be accepted. This process greatly reduces the number of individuals eligible for admission. Additionally, a doctoral degree is expensive, not only in monetary value but in time. The time commitment is not only for studying but taking away from the individual's personal life because most

doctoral students are older, have a family, and are employed. Lastly, doctoral students have a time limit on obtaining their doctorate degree which is another form of pressure.

Learner-oriented learning had greater support than activity-oriented learning, but less support than goal-oriented learning. All participants enjoyed continuous learning. Some doctoral candidates may have entered into the doctoral program as learner-oriented learners, but evolved into goal-oriented learners based upon the time limit and program framework imposed upon the candidates in the doctoral program.

Interview responses were analyzed for goal-oriented learning, activity-oriented learning, and learner-oriented learning. In goal-oriented learning, responses included external rewards of job advancement, more money, and title. For activity-oriented learning, responses included enjoying being around like-minded people, hearing different outlooks, support systems, and classmates' influence. Activity-oriented learning had less support among the participants who were doctoral candidates than the non-degree students in Houle's study. Perhaps Houle's students were motivated and needed activity-oriented learning as part of their learning while for the doctoral students, activity-oriented learning was not as important. For learner-oriented learning, responses included interest in topics; personal drive; continually searching for answers and contributions; internal focus; challenging self; knowing more; hearing different outlooks; and knowing there is more to learn.

In Stein, Trinko, and Wanstreet's (2008) PRiSM model, the *P* stands for possibilities of intellectual opportunities. For example, the participants discussed learning from their colleagues and enjoyment from the discussions, which is also a recognized descriptor of activity-oriented learning. The *R* stands for reflective learner.

Felicia demonstrated her reflective leaning when she discussed how her Ph.D. experience was transformative, which is a descriptor of learner-oriented learning. Next, the *i* stands for institutional support, and many participants discussed having a strong support system at USF, with colleagues and professors, which is a descriptor of activity-oriented learning. The *S* stands for synchronizing learning and earning. Felicia demonstrated this as a graduate assistant who worked at the university in exchange for payment of tuition, which is a descriptor of goal-oriented learning. Finally, the *M* stands for matching with academic reputation which participants discussed finding the program that worked for their needs. Within this research, Ed, and Felicia discussed how they came to find their programs and how it was a good match for them. Ed and Felicia liked the courses that were offered, which is a descriptor of goal-oriented learning. Although research question 1 supported social capital, social capital was also represented in the findings for research question 2. Additionally, the participants stated a desire to give back to their field and community. This notion is representative of the idea of “social capital” where likeminded adults work towards a common goal and take responsibility for issues affecting their lives and their communities, which is a descriptor of goal-oriented learning.

In conclusion, prior research on Houle’s typology has not consistently indicated whether research participants were in formal education programs or non-formal. This research demonstrated that the descriptors for activity-oriented learners in relation to the participating doctoral students in formal education programs lacked support. Of Houle’s 15 descriptors, only three had representative, supportive statements made by the doctoral

student participants. Houle's typology may not be relevant to all adult education contexts.

Research question 2. B. – New typologies that will add to and update Houle's typology.

Participants had strong motivations that compelled them to pursue their education at the highest level. Houle's typology is still relevant; however, for the participants in this study, four additional themes emerged from the interviews. First, motivation included participants' setting a good example for their children by being a good role model. Second, participants were motivated to achieve their doctorate so they would be contributing to society. Third, the motivation of the participants in the program helped them gain self-confidence. Fourth, self-fulfillment was a strong motivator to pursue a degree. The initial three learner types (goal-oriented learning, activity-oriented learning, and learner-oriented learning) appeared to be appropriate for entering into the program, but activity-oriented learning was less frequently illustrated when participants described their learning experiences during the program. The last four mentioned (role-model, contributing to society, self-confidence, and self-fulfillment) were described as important for continuing in the doctoral program.

Burgess (1971) described the adult learner as having a desire to reach a social goal which can be pressure exerted by acquaintances, friends, relatives, or society as a whole. These pressures appeared to be presented as a more negative peer pressure. Doctoral student participants in this study perceived pressure from family and friends as positive pressure often related to the responsibility they felt to be a role model, particularly for their children.

As a role model an adult learner needs to set a good example for his or her children to motivate their children to value education. An adult learner's motivation can be intensified because he or she is influenced by how the decision to continue education has impacted others such as children and community. As for the community, adult learners want to give back and influence others, the way they have been influenced.

An unexpected learning was that these doctoral students perceived their participation in doctoral study built their self-confidence. Because this is an unexpected learning, it cannot be considered a motivation for continuing to learn, but perhaps an added benefit. Previously, mentioned in research question 1, self-confidence supports the top level of Maslow's (1954) pyramid hierarchy of needs. Self-confidence can be gained by accomplishing goals, and goal-fulfillment was described by many of the participating doctoral students as an internal motivator.

In conclusion, non-credit adult students studied by Houle and the doctoral students participating in this study are both continuing to learn. There are parts of Houle's typology that remain relevant for contemporary doctoral students. However, for the participants in this study, four additional themes emerged from the interviews: (1) setting a good example for their children by being a good role model; (2) contributing to society; (3) gaining self-confidence; and (4) self-fulfillment.

Limitations

One limitation of this study is that it was conducted at only one institution, specifically a large urban research extensive institution. A second limitation is that the study looked at doctoral students in a college of education, excluding students in other fields. Additionally, only a small subset of doctoral students in a specific academic

department was identified for the study. Students in different institutions and different fields may have different views and perspectives from the sample used in this study. Also, these limitations may influence the applicability of the findings to other types of higher education institutions and other fields of study.

Additionally, the number of participants in this study was small (6), and data collected from these participants consisted of initial and follow-up interviews, taking no more than 2 hours to complete. In qualitative research, the outcome is not to generalize, but to understand a group of students' views. However, it is recognized that the depth of students' responses can be limited by the time constraints of the interviews.

Implications for Practice

When developing credit and non-credit programs for adults, motivations discussed in this study need to be incorporated into program planning to help engage adult participation and sustain motivations for continuous learning. There are parts of Houle's typology that remain relevant for contemporary adult students. However, for the participants in this study, four additional themes emerged from the interviews: (1) setting a good example for their children by being a good role model; (2) contributing to society; (3) gaining self-confidence; and (4) self-fulfillment. Programs should provide learning experiences that fulfill Houle's original typology, but also address students' needs to be good role models, contribute to society, gain self-confidence, and contribute to self-fulfillment.

Houle's original typology is still relevant as strong motivators for adult learners. However, it is good practice to review and research current adult learners' motivations to see if Houle's learning types change or need updating. Looking back at the findings of

this study, interviewees stated that they wanted: to finish the program for themselves; enjoyed the intrinsic feeling from working with students; saw the doctorate as a transformative experience; found personal meaning in obtaining a doctorate; were internally-focused; desired job fulfillment; possessed personal drive to obtain a doctorate; proved they can accomplish a doctorate; and saw the accomplishment of a Ph.D. as a personal goal.

Participants had strong internal components behind their motivation rather than activity oriented learning perspectives as interviewees were not merely trying to find introspective or intrapersonal meaning. The interviewees were expressing they wanted to be *internally satisfied* after obtaining a Ph.D. This was more of a feeling than how they saw themselves as a learner. This is also more than just a learner-oriented perspective or general love of learning. These doctoral students loved learning, but they wanted the satisfaction of knowing they had accomplished this difficult goal.

Recommendations for Future Research

Prior research on Houle's typology has not consistently indicated whether research participants were in formal education programs or non-formal settings. When the descriptors for activity-oriented learners were applied to the perspectives of doctoral students in a formal education program in this study, many descriptors (12 out of 15) were not a good fit. So, formal versus non-formal learning context matters in researching Houle's typology and perhaps in researching adult learner types in general. In the past we may have falsely accepted that Houle's typology was relevant to *all* adult education contexts when that may not be the case at all. An analysis of studies conducted on Houle's typology, looking specifically at the contexts in which the studies took place,

would be useful for our current considerations of the relevance of that typology for *all* adult education.

One recommendation for further research specific to this study is to interview more than six adult learners. Saturation in the field was achieved because the six participants' interview responses were overlapping; however, interviewing more participants might have provided additional findings and solidified or refuted the interview overlapping answers. Re-interviewing the adult learners throughout the entire doctoral process might also have provided additional insight. Through this, the interviewer would have a chance to see how motivation changes and the reasons for the motivation change. Perhaps a longitudinal study would reveal more to us about how learner types change from enrollment in a formal doctoral program to the end of a program.

Another recommendation for further research would be a quantitative study of students from one discipline nationwide. Such a study might use, for example, Boshier's (1971) instrument which was originally administered to 233 randomly selected participants in continuing education courses in a high school, a university extension site, and a professional association program in Canada.

It may also be of advantage to study students from various fields of study and other institutions to see if there are differences in their motivations. Following this type of study, an additional study might use both Houle's original typology and the four new motivations for learning to confirm or disconfirm how consistently these new areas are represented.

Conclusion

In conclusion, adult learners returning to formal education seem to represent Houle's three learner types (goal-oriented learner, activity-oriented learner, and learner-oriented learner), even though in this study of doctoral students, there is far less evidence to support the activity-oriented learner. It appears that these doctoral students did not require as many social interactions as Houle's non-degree students.

Additional findings and themes emerged. The adult learners participating in this study feel they are role models, they have a desire to contribute to society, they believe they gained self-confidence during their doctoral studies, and they seek self-fulfillment. Participants who have children find them at times to be an obstacle for obtaining their doctorate; however, their children also motivate them to continue to achieve their doctorate because they want to set a good example. Also, these adult students have a desire to contribute to society after obtaining their degree. They feel that after earning a doctorate, they have a credential that allows them to make changes and help society. Additionally, these adult students through the process of their doctorate gained self-confidence. This self-confidence is an added benefit that most students did not have in mind as one of their motivations for being involved in their program. Lastly, these adult learners want self-fulfillment. The self-fulfillment is a feeling and sense of accomplishment after all their hard work.

The seven themes represented in this study were goal-oriented learning, activity-oriented learning, learner-oriented learning, role modeling, contributing to society, self-confidence, and self-fulfillment. All the themes seemed to be very prevalent except for activity-oriented learning. This leads this researcher to believe that Houle's non-degree

students were motivated by interacting with others while the graduate students participating in this study are motivated through goal-oriented learning and love of learning. In addition, these adult learners are motivated by being a role model, contributing to society, gaining self-confidence, and seeking self-fulfillment.

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APPENDICES

Appendix A. Personal Communication to use Keintz Questions

Hello Dr. Young.

I am writing you because I was contacted by my former dissertation advisor at the University of Wyoming. He said that a student of yours, Christi Bolck, was interested in using the survey I developed for evaluating active adult learners when I was a doctoral student at the University of Wyoming. She has my permission to work with the survey and use it as she needs. My only request is that she contact me through email or by phone to let me know how her revision will change the previous copy. I am also interested in her study so I would appreciate if she contacts me with a link to a copy of your study when she has defended. I appreciate the follow up to get my permission. Please pass on my wish for her success.

Best wishes.

Dr. Brian Keintz

RE: Question about using dissertation questions

From: Brian Keintz <bkeintz@keiseruniversity.edu>

To: Kristi <Kthleopard@aol.com>

Date: Mon, Jan 12, 2015 5:50 pm

Hello Kristi.

Thank you for contacting me. Congratulations on the progress you have made with your dissertation and on getting your pilot completed. I am happy to allow you to use questions from my study. I am excited to see the results of your work. Let me know when you have the final version in print so I can read a copy. Good luck in your continued progress.

Best wishes!

Dr. Keintz

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Appendix B. Recruitment Letter



6-7-16

Re: Dissertation Research Study on Adult Motivation and Participation in Continued Education, IRB Protocol # Pro00024828

Dear Student,

My name is Kristeen Bulluck, a doctoral candidate in the Ph.D. program in Adult Education at the University of South Florida. I am writing to let you know about an opportunity to participate in a dissertation research study about adult motivation and participation in continued education. This study is focused on individuals who are enrolling in an Ph.D. program.

I am contacting you for this study because you are 40 years or older and enrolled in a Ph.D. program in the College of Education at the University of South Florida. It is important for higher education institutions to understand why students continue to pursue advanced education. The information from this study is for research purposes only. No individual will be identified in the study. Information provided for the study will be secured with password protected access by the researchers only. Dr. William Young is my Major Professor and Co-PI on the study.

This is an interview study. It is anticipated that 2.5 hours of your time will be needed to complete the initial interview, follow-up interview, and interview transcript checks. Interviews will be recorded and transcribed.

There is no compensation for participation in this study. Potential benefit to you is experience as a participant in a research study. Such experience can inform your future work as a doctoral student.

If you would like additional information about this study, please call Kristeen Bulluck at (727) 417-4925 or email at kthleopard@aol.com.

Thank you again for considering this research opportunity.

Kristeen Bulluck
Primary Investigator
Ph.D. Candidate in Adult Education at University of South Florida

Appendix C. Informed Consent



Informed Consent to Participate in Research Involving Minimal Risk Information to Consider Before Taking Part in this Research Study

Pro # 00024828

You are being asked to take part in a research study. Research studies include only people who choose to take part. This document is called an informed consent form. Please read this information carefully and take your time making your decision. Ask the researcher or study staff to discuss this consent form with you, please ask him/her to explain any words or information you do not clearly understand.

We are asking you to take part in a research study called:

Examining the Learning Orientations of Adult Students

The person who is in charge of this research study is Kristeen Bulluck. This person is called the Principal Investigator. However, other research staff may be involved and can act on behalf of the person in charge. She is being guided in this research by Dr. William Young.

The research will be conducted at the University of South Florida Education Building or a convenient place for the participant.

Purpose of the study

The purpose of this study was to learn why doctorate students in LCACHE department were continuing to participate in formal education.

Why are you being asked to take part?

We are asking you to take part in this research study because you are being asked to participate in this research because you are an active doctoral student and we want to know what motivates you to continue your education.

Study Procedures:

If you take part in this study, you will be asked to:

- First as a participant, you will be asked to fill out a Learner Questionnaire, which asks basic educational background and demographical information. Next

participants will be interviewed about what motivates you to continue your education. Then a follow-up interview will take place.

- Participants will be given a list of questions that will be asked in the initial interview once agreeing to participate.
- The participants will be interviewed 2 times for 1 hour each time. The first will be an initial interview and the second will be a follow-up interview.
- The interviews will be conducted at the USF Education Building or a place of convenience for the participant. The time frame for interviews will be at the participant's leisure;
- Interviews will be tape recorded for transcription. Only the Primary Investigator and her Major Professor will have access to the tapes. The tapes and transcripts will be maintained for 5 years after the Final Report is submitted to IRB and kept in a secure lock box. All written computer data will be password protected. After the 5 years the tape recorder and computer data will be erased and any paper documents will be destroyed.

Total Number of Participants

About 6-8 individuals will take part in this study at USF.

Alternatives / Voluntary Participation / Withdrawal

You do not have to participate in this research study.

You should only take part in this study if you want to volunteer. You should not feel that there is any pressure to take part in the study. You are free to participate in this research or withdraw at any time. There will be no penalty or loss of benefits you are entitled to receive if you stop taking part in this study. Decision to not participate will not affect your student status, course grades, or job status.

Benefits

You will receive no benefit(s) by participating in this research study.

Risks or Discomfort

This research is considered to be minimal risk. That means that the risks associated with this study are the same as what you face every day. There are no known additional risks to those who take part in this study.

Compensation

You will receive no payment or other compensation for taking part in this study.

Costs

It will not cost you anything to take part in the study.

Privacy and Confidentiality

We will keep your study records private and confidential. Certain people may need to see your study records. Anyone who looks at your records must keep them confidential. These individuals include:

- The research team, including the Principal Investigator, study coordinator, and all other research staff.
- Certain government and university people who need to know more about the study, and individuals who provide oversight to ensure that we are doing the study in the right way.
- Any agency of the federal, state, or local government that regulates this research.
- The USF Institutional Review Board (IRB) and related staff who have oversight responsibilities for this study, including staff in USF Research Integrity and Compliance.

We may publish what we learn from this study. If we do, we will not include your name. We will not publish anything that would let people know who you are.

You can get the answers to your questions, concerns, or complaints

If you have any questions, concerns or complaints about this study, or experience an unanticipated problem, call Kristeen Bulluck at (727) 202-6602.

If you have questions about your rights as a participant in this study, or have complaints, concerns or issues you want to discuss with someone outside the research, call the USF IRB at (813) 974-5638.

Consent to Take Part in this Research Study

I freely give my consent to take part in this study. I understand that by signing this form I am agreeing to take part in research. I have received a copy of this form to take with me.

Signature of Person Taking Part in Study

Date

Printed Name of Person Taking Part in Study

Statement of Person Obtaining Informed Consent

I have carefully explained to the person taking part in the study what he or she can expect from their participation. I confirm that this research subject speaks the language that was used to explain this research and is receiving an informed consent form in their primary language. This research subject has provided legally effective informed consent.

Signature of Person obtaining Informed Consent

Date

Printed Name of Person Obtaining Informed Consent

Appendix D. Keintz (2004) Adult Learner Questionnaire

1. Name _____
2. Age _____
3. Ethnic Group
__ White __ Native American
__ African America __ Multiracial (Please specify) _____
__ Hispanic __ Other (Please specify) _____
__ Asian
4. Primary Occupation _____
5. Number of years employed _____
6. At your occupation, are there requirements for continuing education? Yes No
7. If you answered “yes” for continuing education requirements, please list them

8. Degree you are seeking _____
9. Full-time student or Part-time student
10. Formal Education Completed
__ Graduation Equivalency Degree (GED)
__ Trade School _____
__ Military Training School _____
__ Associate’s Degree(s) _____
__ Bachelor’s Degree(s) _____
__ Master’s Degree(s) _____
__ Professional Degree(s) _____
__ Doctoral Degree(s) _____
__ Other Degree(s) _____
- Non-Formal Education
__ Community Education _____
__ Community Leadership _____
__ Community Recreation _____
__ Continuing Education _____
__ Health and Wellness Agency _____
__ Non-Credit Enrichment Course _____
__ Service Organization _____
__ Professional Association _____
__ Other _____

Appendix E. Adapted Keintz (2004) Semi-Structured List of Interview Questions
(The number and/or number with a letter at the end of the question connects the interview questions to the research questions)

General Questions:

1. What is the educational background of your family? Parents? What degrees were earned? (background)
2. What are your personal goals? What role do you see education playing in your life? (background)
3. What motivates you to enroll in educational activities? (1.A.)
4. In your current occupation, what kinds of educational activities are provided for the development of job skills and knowledge? Do you receive any incentives for continuing your education? (1.A.)

Learning Processes Questions:

5. Please select a meaningful learning experience and tell me about it. Why was this experience meaningful to you? What elements of this experience made it appealing? What did you learn from this experience? (1.A.)
6. Based on your learning experience at USF, what teaching methods have you found to be most beneficial to your learning? What methods are most effective in helping you learn? How do you learn best? (1.A.)
7. What do you see as the role of the instructor, facilitator, or leaders in your process of learning? What do you feel is your role in the process of learning? (1.)

Reflective Thinking/Decision-Making Questions:

8. When are the times when you do your best thinking? (1. & 1.A.)
9. Do you feel your educational experiences have affected your ability to think and reflect effectively? Explain. (1.A.)
10. Please describe for me the last time you were faced with a complicated question or problem that required a great deal of energy to determine a solution. Please describe this situation. What is the process you go through mentally when you are faced with a challenging and complex problem? (1.)

Participation in Learning Questions:

11. What motivates you to learn? (2.)
12. How did you arrive at the decision to participate in (Adult Education Department, Career Department, Higher Education Department, or Educational Leadership Department) as an activity? (2.)
13. What factors, if any, could make your participation in learning more difficult? What factors contribute to you desire to participate in learning activities? (1. &2.B)
14. Who do you feel are the greatest supporters of your learning activities? (family, friends, parents) Why? Who do you feel are non-supporters of you learning activities? Why? Describe for me what you feel people in your life would say about your participation in education? (2.)

Appendix F. Follow-up Questions

1. What is your overall philosophy of education? (1.)
2. Tell me what commitments your program requires? (i.e., credit hours, written exam, conferences, publications). What other commitments do you have in the week? (i.e., job, family) How will you or do you motivate yourself to do it all? (1.)
3. Do you have a dissertation topic of interest or a few? How did you select this topic? Why are you so passionate or motivated on this topic? (1.) (1.A)
4. What are your ideas about motivation and obtaining a doctorate? (1.) (1.A.)
5. What qualities do you think a doctorate student needs to possess? How does motivation fit in with those qualities? (1.) (1.A.)
6. Your best qualities that assisted you in your doctorate program? Qualities that your improving on through your doctorate program? (1.A.) (2.)
7. Has your motivation to continue your education as a student changed since you started in your doctorate program? (1.A.)
8. How have you changed or grown through the year or more time you've spent in your program? (1.A.) (2.) (2.B.)
9. Has your motivation to continue your education as a student changed from your bachelor's, master's, to doctorate? (1.A.)
10. What activities will you continue to learn by after obtaining your Ph.D.? (1.A.)
11. Tell about a time when someone made a difference in your life? (1.A.)
12. Tell about a time when you motivated someone else to continue learning or someone else motivated you to continued learning? (1.A.)
13. Do you admire someone or have a mentor in education? Why do you admire this person? (2.)
14. The best advice, maybe you gave or you were ever given in education? (1.A.)

15. What has been your greatest obstacle in your educational career that you've had to overcome? And how did you motivate yourself to get through it? (1.A.)

16. Do you have advice or wisdom for other adult learners who want to start a doctorate program? (1.A) (2.)

17. Do you have anything else you want to share or add about motivation and continued learning that we haven't covered? (1.) (1.A.) (2.) (2.B.)

Appendix G: Interview Classification of Students and Typology Criteria with Modifications

<p>Goal-oriented learning</p>	<p>Begins with realization of a need or interest Not steadily or continuously involved in learning Not restricted to any activity, to one institution, or method of learning Need or interest appears to be satisfied by taking a course, joining a group, reading a book, or going on a trip (Houle, 1961)</p> <p>Personal goal orientation- participating in education to accomplish fairly clear-cut personal objectives (Sheffield, 1964) The desire to reach a personal goal- desire to gain certain knowledge or skills in order to improve abilities (Burgess, 1971) Professional advancement- job status, job competence, degree, formal requirements, other education (Boshier, 1971)</p>
<p>Activity-oriented learning</p>	<p>Participates socially to meet people and make friends Seeks to find a husband or wife, credit, escape problems, carry on traditions or meaningless activity Part of heritage. May not say truth about motives to learn. Finds success in coursework and not job (Houle, 1961)</p> <p>The desire to take part in a social activity- enjoyed for companionship, fellowship, feeling of belonging, approval by others, or positive association with others (Burgess, 1971) Community service- citizenship, community service, mankind, insight, human relations, supplemented education, life center, education centers (Boshier, 1971) Social stimulation, social contract, external expectation, community service (Gordon, 1993)</p> <p>Societal-goal orientation- participating in education to accomplish clear-cut social or community objectives (Sheffield, 1964) The desire to reach a social goal- pressures exerted by acquaintances, friends, relatives, or society as a whole (Burgess, 1971) The desire to comply with formal requirements- desire to earn a certain degree required by employer, meet certain conditions required by certain groups, meet requirements of a judge, a social welfare worker, or some other authority (Burgess, 1971) External expectations-recommendation, comply, instruct, competition, keep up, social pressure (Boshier, 1971)</p>

	<p>Need-activity orientation- taking part because in the circumstances of learning an introspective or intrapersonal meaning is found which may have no necessary connection, and often no connection at all, with the announced purpose of the activity (Sheffield, 1974)</p> <p>The desire to escape- escape activity or situation or avoid unpleasantness or tedium (Burgess, 1971)</p> <p>Social stimulation-boredom, frustration, break routine, escape (Boshier, 1971)</p> <p>Religious goal, escape, required activity, social pressure (Houle, 1983)</p>
Learner-oriented learning	<p>Joins groups or classes for educational reasons</p> <p>Has a constant goal rather than continuous</p> <p>Avid reader, since childhood</p> <p>Selects serious programs on television</p> <p>Job selected for potential growth</p> <p>Trips planned out for what to see</p> <p>Desires to know</p> <p>Preoccupied with learning</p> <p>Learning is their way of having fun</p> <p>Self-concept that they are different from others. (Houle, 1961)</p> <p>Learning-orientation- taking part because in the circumstances of the learning and interpersonal or social meaning is found which may have no necessary connection at all with the content of the announced purposes of the activity (Sheffield, 1964)</p> <p>The desire to know- intellect appreciation, pleasure from learning, enjoy mental exercise, and remain in command of learning (Burgess, 1971)</p> <p>Cognitive interest- own sake, inquiring, joy learning, sake learning, community intent (Boshier, 1971)</p> <p>Self-directed (Brockert and Donaghy, 2011)</p>
Self-fulfilled learning	<p>Prove self, independence, self-improvement (Bulluck, 2014)</p>

Appendix H: Sample Excerpt from Initial Interview

Kristeen Bulluck: What are your personal goals now with why you're going back to school and what role is it playing in your life?

Barbara: So my personal goals is that it's-- receiving my doctorate, obtaining my doctorate is something that I have always desired. And for the last 17 years, I've talked about doing so. Always wanted to reach this goal for myself and when I moved...from that point forward, I talked about pursuing it and never did. And just decided a few years ago that it was time to stop talking about it and to make it happen. And so, it's something that I've always wanted to do and realized that it was more personal than professional, although I would like to be an assistant vice president. I know that it could be beneficial to me in this manner as I continue to grow in my career. But I also have seen several people that have been promoted without having their doctorate and just decided it's what I wanted to do for myself.

Kristeen Bulluck: Yeah. So you said after 17 years you decided. I think this might come up later but I wanted to make sure. What was the deciding factor? What made you feel that you wanted to go on at that point?

Barbara: I think really the people that-- what I realized is that I enjoyed aspects, many aspects, of higher ed. And many people that influenced me early but educational career were people at the higher ed level. And I was really impressed by several black women that I came in contact with that had their doctorates, that talked very openly about their path wasn't easy but how it just opened different doors for them that allowed them to open different doors for young women and men that were coming behind them. And so that always stayed with me and now I believe that, as I continue to grow, I can do the same for others once I finally achieve the goal for myself.

Kristeen Bulluck: Right. We'll move on to the learning process questions. Please select a meaningful learning experience and tell about it. Why was this experience meaningful to you and what elements of this experience made it appealing? This could even be way back when you met maybe one of those professors that you had who influenced you. You could tell about that.

Barbara: So I think what experience I'll use is when I first started undergrad. I don't test well and So, based on my standardized tests, I went into school needing to take some remedial courses. I think I had to take two courses. Went in and was working with the Upward Bound program and my advisor at that time worked with me for the first couple of years to set me on a strong path. And one of the remedial courses that I had to take was in math and the instructor, although it was a remedial course, really honed in on the fact that needing to take this course didn't make us less than, less intelligent, than others that may not have been there, but that we needed merely to sharpen our skills so that we could be prepared for what was to come. The professor met with me as much as I needed to meet with her to make sure I understood the content, not that I just passed but to make sure that I understood and have the foundation. And her investment in me over that semester-- I wouldn't say that it validated me because my parents did that but it made me feel more confident about my abilities going forward for the next four years. And it strengthened, to the greater extent, what I believed that I could do because she continued to reiterate how she believed in us and made sure that we were going to be prepared to embrace and be successful in what was coming. I did fine in it and, of course, excelled in my undergraduate studies but it made me realize the-- what was most valuable for me was it made me realize the importance of people truly investing in you because I believe in you and can see the potential. And I think that experience really set me up for success for the remainder of my undergraduate years.

Kristeen Bulluck: Okay. Would it have an element where you are doing that for other people too, that kind of inspiration?

Barbara: I think I do that every day in my work, whether it's a part of my job responsibility or just a part of who I am. I've always worked with Summer Bridge programs. Now I work with a graduate program and I still think that I give back by making sure they have what they need in order for their transition to be as smooth as possible. So I think it's just a part of who I am and making sure that people transition well. And also knowing that, if you set your mind to it-- and I encourage students when they're challenged by things or have concerns about things that there isn't anything that we really can't do if we are determined, if we set our minds to it, and if we believe in ourselves. And so I encouraged him in that manner.

Appendix I: Sample Excerpt from Follow-up Interview

Kristeen Bulluck: -- Number four, what are your ideas of motivation in obtaining a doctorate?

Barbara: I... for me, it's just my own personal self-motivation. I wanted to enroll. I've wanted to have a doctorate for years, and my motivation was two-fold. That I wanted to have it before I was 50, and 50's closer than I would like for it to be. And that I wanted to-- to do it, to prove to myself that this was a goal that I could achieve. And so, my motivation is fulfilling my own personal goal. Yes, it'll help me professionally, but this is more personal for me than anything else.

Kristeen Bulluck: Right. Right. And number five, what qualities do you think a doctorate student needs to possess? And I should have finished that out to, be-- to finish a doctorate, probably. And how does motivation fit into those qualities?

Barbara: The qualities I think someone needs to possess in order to be in a program, or-- or in order to complete it, or in order to persist in it, is first of all, I think they have to be optimistic about what they're encountering and approaching. I think they have to be confident in their own ability to be successful. And I think they have to be self-motivated. It's an entirely different way of learning, it's different from what we are accustomed to in undergrad or even graduate school. And, you have to be self-reliant. You have to make it happen for yourself. To me the instructors are truly facilitators of knowledge but it's your own personal responsibility to learn the content. So, I think those are some of the things that-- qualities they would have to possess. And, I think motivation, however and whatever it is, that motivates them is-- is the underlying and driving force behind it all.

Kristeen Bulluck: Okay. Number ten, what activities will you continue to learn after obtaining your Ph.D.? Will you do more course work?

Barbara: I do not plan on doing anymore course work.

Kristeen Bulluck: I agree with you, there.

Barbara: Don't think I will do that anytime soon. But I am currently-- while I'm in my program, I am currently working on getting in the classroom to be an instructor. And I will continue to take advantage of professional development opportunities. I always have and I always will. That helped to sharpen my skill sets that would bring additional knowledge, that would enlighten what I think I know perhaps, or broaden what I think I know. So, I believe in professional development and I will continue to be a part of professional development organizations and what opportunities present themselves. I'll make sure that I take advantage of that. Because I don't think the learning ever stops. And so, in order for me to be the best me that I can be, I need to make sure that if it's an opportunity that's presented that I take advantage of it.

Kristeen Bulluck: And number 11, tell me about a time when someone made a difference in your life.

Barbara: So one thing that made a difference--I used to plan a lot of events...the vice president came in to talk to me one day, and she reiterated that the work that I was doing, but also talked about how, no one had ever taken her under their wing to mentor her. And so, she spent the next hour, and said there's some things that were shared with her earlier in her career, that she wanted to share with me, pertaining to dealing with difficulty and difficult people. And, the fact that she sat down and said, often times we take it personal, but we shouldn't because what we need to do is look at the totality of the situation, and even take into consideration the person who is bringing whatever it is to the forefront and recognize that all of that belongs to them. And stop taking it on, and taking it personal, because none of it belongs to me. Not saying that if there was something I played role in but just broadly that often times, when people are bringing challenging situations, or difficult to work with have nothing to do with you, but it's just a part of who they are, and you have to let them own it instead of me owning it. And during that same time, as we were trying to get things done. I was a bit challenged because I don't believe in being a perfectionist, because I don't-- I don't think that we can be, and I think that we-- I think it can be detrimental when we try to be so perfect, and you don't always get it right. So I choose not to try and be a perfectionist, I just try to do good work. And younger-- when I was younger in my career, I wanted it done, the way that I wanted it done. Whether my way was right, it was the way I wanted it done. And my sister said to me during this same time when we were dealing with the difficult people, if it yields what you're looking for in the end, be not concerned about how you get there. As long as the end of result is what you need. And so, those two comments, those two people around the same situation, really sort of changed my outlook on how I perform my work. And I still do it to this day, be as creative as you want, this is the outcome, get us there, and that's all that matters.

Appendix J. IRB Approval Letter



RESEARCH INTEGRITY AND COMPLIANCE
Institutional Review Boards, FWA No. 00001669
12901 Bruce B. Downs Blvd., MDC035 • Tampa, FL 33612-4799
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January 29, 2016

Kristeen Bulluck
L-CACHE - Leadership, Counseling, Adult, Career & Higher Education
St. Pete, FL 33702

RE: Expedited Approval for Initial Review

IRB#: Pro00024828

Title: A Qualitative Study Examining the Learning Orientations of Adult Students Using Houle's Typology as a Framework

Study Approval Period: 1/29/2016 to 1/29/2017

Dear Ms. Bulluck:

On 1/29/2016, the Institutional Review Board (IRB) reviewed and **APPROVED** the above application and all documents contained within, including those outlined below.

Approved Item(s):

Protocol Document(s):

[Kristeen Bulluck Protocol](#)

Consent/Assent Document(s)*:

[Consent Form.pdf](#)

*Please use only the official IRB stamped informed consent/assent document(s) found under the "Attachments" tab. Please note, these consent/assent document(s) are only valid during the approval period indicated at the top of the form(s).

It was the determination of the IRB that your study qualified for expedited review which includes activities that (1) present no more than minimal risk to human subjects, and (2) involve only procedures listed in one or more of the categories outlined below. The IRB may review research through the expedited review procedure authorized by 45CFR46.110 and 21 CFR 56.110. The research proposed in this study is categorized under the following expedited review

category:

(6) Collection of data from voice, video, digital, or image recordings made for research purposes.

(7) Research on individual or group characteristics or behavior (including, but not limited to, research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices, and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

As the principal investigator of this study, it is your responsibility to conduct this study in accordance with IRB policies and procedures and as approved by the IRB. Any changes to the approved research must be submitted to the IRB for review and approval via an amendment. Additionally, all unanticipated problems must be reported to the USF IRB within five (5) calendar days.

We appreciate your dedication to the ethical conduct of human subject research at the University of South Florida and your continued commitment to human research protections. If you have any questions regarding this matter, please call 813-974-5638.

Sincerely,

A handwritten signature in black ink that reads "John A. Schinka, Ph.D." The signature is written in a cursive style.

John Schinka, Ph.D., Chairperson
USF Institutional Review Board

About the Author

As a three-time University of South Florida (USF) Bull, with a bachelor's, master's, and doctorate all from USF; Kristeen Bulluck has a strong USF background!

Her teaching career started in 2002, when she was substitute teacher. After realizing that she really enjoyed teaching, She decided to go back for her master's in elementary education and graduated in 2006. Throughout her elementary career, she has taught elementary grades kindergarten, 1st, and 2nd grades. She also has taught summer reader's camp to 3rd graders and summer writer's camp through Pointer Institute to grades 6th through 8th. She had several interns from USF.

In 2010, she began the pursuit of a Ph.D. in Adult Education. During this process she studied abroad in Sweden and Germany. Throughout her Ph.D. program, she has served as a student ambassador for the Leadership, Adult, Career, and Higher Education Annual Summer Retreat. She was inducted into an honor society Delta Epsilon Iota and was selected to present her research at several conferences (International Self-Directed Learning Symposium, American Association for Adult and Continuing Education, and Hawaii International Conference on Education). At the 7th Annual USF Doctorate and Postdoctoral Research Symposium she was selected as one of the winners. She was a three time Student Government Travel Scholarship Recipient and published a book review for an educational psychology journal *Educational Review*. In 2015, she also was awarded The Golden Bull for her outstanding leadership at USF and in the community.